

WORKING PAPER

Learning about the effects of development education programmes

Towards a learning centred
monitoring and evaluation
practice



Jan Van Ongevalle & Bénédicte Fonteneau



LEARNING ABOUT THE EFFECTS OF DEVELOPMENT EDUCATION PROGRAMMES

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Abstract

This paper reports on the results of an action research project (2010-2013) in which ten Belgian organisations who implement development education programmes explored different planning, monitoring, and evaluation (PME) approaches with the aim of learning more effectively about their results. PME approaches piloted included outcome mapping, most significant change, scoring tools and survey instruments. This report seeks to further the debate about the implications of the complexity of development education programmes for their PME. Such debate is needed in view of a growing call for results-based management of externally funded development education programmes. Based on the literature from the fields of international development cooperation and development education, and supported by the research results, we argue that there is a need for alternative results-based management approaches that promote learning and help actors involved in development education deal with unpredictability and non-linearity.

COMMENTS ARE WELCOME jan.vanongevalle@kuleuven.be; benedicte.fonteneau@kuleuven.be

KU Leuven
HIVA - RESEARCH INSTITUTE FOR WORK AND SOCIETY
Parkstraat 47 box 5300, 3000 LEUVEN, Belgium
hiva@kuleuven.be
www.hiva.be

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About the authors

Jan Van Ongevalle (jan.vanongevalle@kuleuven.be) is working as research manager with the international development cooperation unit at the Research Institute of Work and Society (HIVA) linked to the University of Leuven in Belgium. Jan has a particular interest in complexity and learning oriented planning, monitoring and evaluation systems for development education and awareness raising (DEAR) programmes as well as programmes of international development.

Bénédicte Fonteneau (benedicte.fonteneau@kuleuven.be) is working as a research expert with the international development cooperation unit at the Research Institute of Work and Society (HIVA) of the University of Leuven in Belgium. Bénédicte is accompanying various French and Belgian NGOs and other development actors in elaborating PME systems related to capacity development and global education issues.

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The authors take full responsibility of the content of and the arguments made in this report.

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1 | Introduction

Development education programmes that receive public funding are confronted with an increasing demand for results (Nygaard, 2009; Krause, 2010). This is in line with the growing international call for results-based management in the international development sector whereby development actors are asked to be accountable for and demonstrate achievement of ‘measurable’ results (Paris Declaration - OECD, 2005; Accra Agenda for Action - OECD, 2008, High-Level Forum on Aid Effectiveness in Busan - OECD, 2011; Open Forum for CSO Development Effectiveness in Istanbul, 2010). The continued pressure on public funding due to the global financial crisis (Lapalainen, 2010) and the falling confidence of the public in traditional development actors in some countries like Belgium (Pollet, 2013), also contributes to this growing results agenda.

At the same time, organisations face considerable challenges to respond to this call for results and to monitor and evaluate the effects or impact of their development education programmes (Scheunpflug & McDonnell, 2008; IOB, 2009; Dominy *et al.*, 2011; Bourn & Hunt, 2011). Similar challenges exist in the field of international development cooperation, where there is also an ongoing debate about the appropriateness of different theoretical perspectives underpinning the practice of result based management and associated planning, monitoring and evaluation (PME) approaches. If and how PME can contribute significantly to learning is one of the questions that continues to fuel this debate (Crawford, 2004; Watson, 2006; Guijt, 2008). This question is also relevant for development education practice. Much of the normative PME-literature stresses the importance of learning and reflection, while in reality many studies point at the failure of mainstream PME approaches in these areas (Biggs & Smith, 2003; Guijt, 2008; Smit, 2007). There is an extensive school of researchers and practitioners linking the problems with learning from PME approaches which are based on a functionalist paradigm and which are often mandatory for organisations that receive public funding Gasper (1997), Earle (2003), Biggs and Smith (2003), Crawford (2004), Davies (2005), Bakewell and Garbutt (2005). Such perspective comes with PME methods such as the logical framework that have a strong focus on accountability and control, and tend to be in conflict with the interpretive paradigm that is required for learning and reflection. They also have a tendency to push out or ignore context and values.

Results-based management can also be approached from a more complexity-oriented worldview. Such perspective is rather critical of the functionalist approach, especially when confronted with change processes that are complex (Ling, 2012; Stern *et al.*, 2012; Mowles, 2010; Rogers, 2008; Guijt, 2008). A complexity perspective accepts that the relation between cause and effect in complex change processes is unpredictable and comes with a high level of uncertainty (Ling, 2012) and emergent outcomes (Rogers, 2008). While the use of linear logic models such as the logframe remains wide spread within the international development sector (OECD-DAC, 2009; Davies, 2005), a rich variety of more complexity oriented PME approaches has been developed and implemented over the years across a wide variety of international development programmes and contexts (Stern *et al.*, 2012; Jones, 2011; Ling, 2012; Davies & Dart, 2005; Earl *et al.*, 2001). There is therefore a lot to learn as development educators from experience in international development programmes with complexity oriented PME approaches.

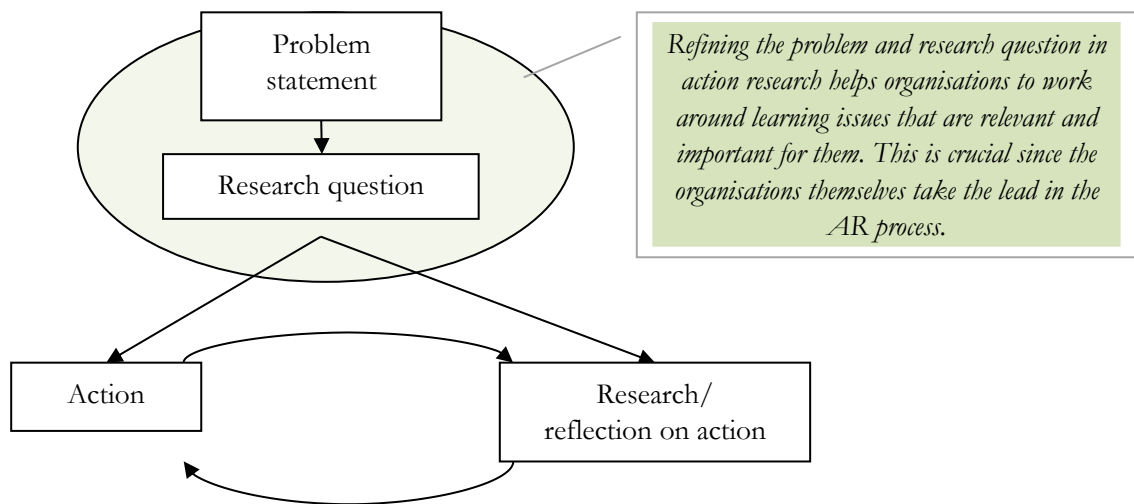
It is in this context that 10 Belgian organisations who implement various development education programmes decided to participate in a participative action research process (2010-2013) where they experimented with various monitoring and evaluation (PME) approaches in order to demonstrate and learn from the results of their development education programmes. These approaches include outcome mapping, most significant change, scoring tools and survey methods. The action research was implemented in the context of the PULSE research platform with support from the Flemish Inter-University Council (VLIR-UOS) and the Belgian Ministry of development cooperation. Two researchers from the Institute of Work and Society (HIVA) from the University of Leuven facilitated the action research.

In this report we first outline the action research methodology that was used to strengthen PME practice. We then draw on the literature to describe the complex nature of development education initiatives and its implications for planning, monitoring and evaluation. Building upon the results of the action research we discuss the importance of clarifying the programme's objectives and purpose as well as its actor centred theory of change as a basis for developing a PME system. We also review the advantages and challenges of the PME approaches that were piloted in the various cases involved in the action research. Furthermore, we discuss the importance of making space for learning about the monitoring and evaluation information for dealing with the unpredictable and non-linear nature of the objectives of development education programmes.

2 | Exploring and strengthening PME practice through action research

Action research (AR) was chosen as method for this study because of its flexible spiral process which allows action (change, improvement) and research (reflection, understanding, knowledge) to be achieved at the same time. The understanding allows more informed change and at the same time is informed by that change. People affected by the change are involved in the action research. This allows the understanding to be widely shared and the change to be pursued with commitment (Dick, 2002). In practice this means that the organisations who participate in the PULSE action research are in the driving seat of the research process and are actively involved in a systematic process of reflection on their PME practice. This way they are able to extract lessons that can inform and strengthen their PME practice. The lessons from the individual organisations are also fed back into the collective learning process of the PULSE programme. The external researchers acted as facilitators throughout the action research process. Figure 2.1 illustrates the essential steps in the action research.

Figure 2.1 Main steps of the action research process (adapted from the Bamenda model of practical action research, Hughes *et al.*, 2004)



The 'action' in Figure 2.1 refers to the implementation of PME activities by the participating organisations. The 'research' refers to the reflection process about the implementation of the PME activities. Both processes inform each other throughout the action research process.

The action-research approach used in this study is not a value-free research process in which the researchers behave as expert independent observers. Instead, in line with the definition of action research by Reason and Bradbury (2001), the research has brought together action and reflection, theory and practice, in collaboration with research participants in order to explore practical solutions towards improved PME practice. Instead of being worried about objectivity, distance, and controls, as in conventional research, as action researchers we worry about ‘relevance, social change, and validity tested in action by the research participants’ (Brydon-Miller *et al.*, 2003).

The action research started with each participating organisation clarifying their respective PME challenges and research questions that they wanted to address during the action research. This was done via reflection sessions with representatives from the case and the research coordinators (two sessions per case). Each case then developed their research plan which spelled out the data to be collected within the PME pilot, how they were going to reflect on these data, and who was going to be involved in data collection and reflection. This was done during an interactive process between cases and research coordinators. Various reflection methods were used by the different cases. These included reflection workshops, personal observation, focus group discussions, document reviews, unstructured interviews and participant observation by the research coordinators. Collective learning moments (three workshops over a three-year period) were organised to share results among the different cases.

It proved to be a major challenge however for the cases to develop their research plan and to systematically follow it through during the action research. Day-to-day programme work would often take priority above the research activities. It was also difficult to plan PME activities in advance and were often adjusted according to changing needs and context and in two cases no monitoring cycles ever started. In addition it often took much more time than originally planned to introduce, customise and implement PME approaches. As a result, cases often only managed to implement one or two monitoring cycles during the course of the research.

Table 2.1 presents an overview of the main cases that participated in the action research. The table also outlines the main PME challenges and the PME approaches that were piloted to address these challenges.

Table 2.1 Overview of the action research cases

Organisation	PME challenges to be addressed in the action research	Main PME approach piloted
TRIAS: strengthening N-S partnerships between member based organisations	<ul style="list-style-type: none"> - Analysis of large amounts of monitoring data - Linking monitoring and evaluation with future planning 	Scoring tools
Vredeseilanden: promoting consumption of locally grown foods in schools through the ‘potverdorie’ campaign	<ul style="list-style-type: none"> - Little known about the effects in schools - Limited success with collection of monitoring data through campaign website 	Outcome mapping
World Solidarity: increasing knowledge and engagement for social protection and decent work as instruments to combat inequality	<ul style="list-style-type: none"> - Limited learning from monitoring information - Limited insight in the effects of the various programme activities - Limited success with collection of monitoring information through questionnaires for target groups 	Outcome mapping

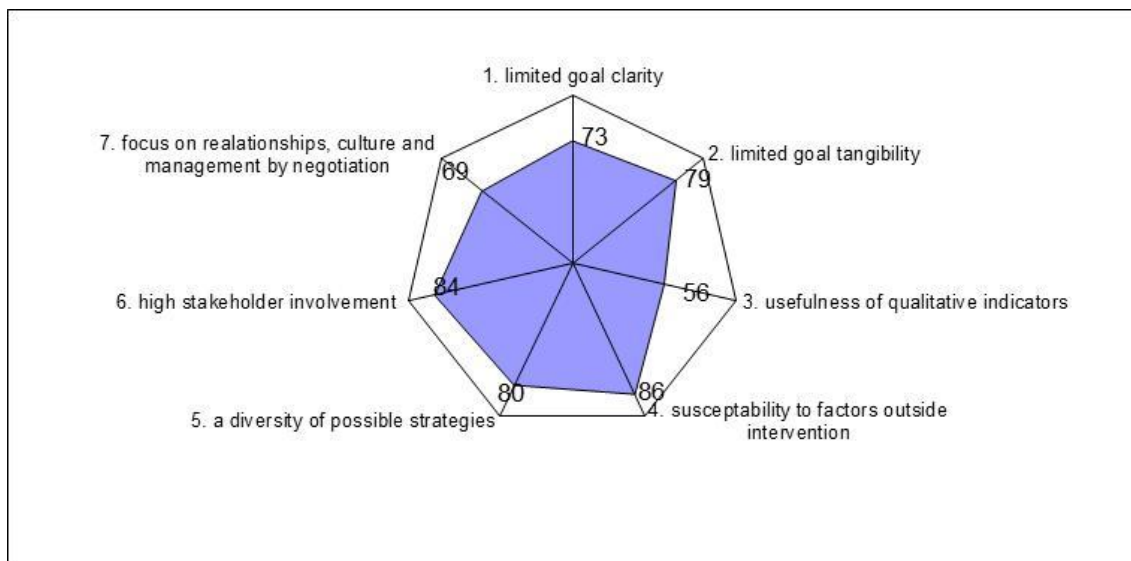
Organisation	PME challenges to be addressed in the action research	Main PME approach piloted
<p>VVOB: SchoolLinks programme to strengthen capacity of Flemish schools to sustain their respective links with schools in the South and to implement development education activities for the pupils</p> <p>VLIR-UOS: student scholarship programme: sensitising students to become ambassadors of global solidarity</p> <p>BOS +: sensitising pupils and wood work students about the importance and opportunities for sustainable forest management</p> <p>Globelink: aims at developing competencies of youth regarding sustainability, global equity and solidarity through the organisation of the youth parliament</p> <p>Open Doek Filmfestival: features movies from different parts of the world and seeks to promote respect for and participation in a multi-cultural society by triggering emotions and feelings within its audience</p> <p>Esperanzah festival: is a yearly three-day 'world music' festival for promoting global citizenship</p> <p>SOS-Faim: development education and advocacy programmes to address the underlying causes of hunger and poverty in rural parts of developing countries</p>	<ul style="list-style-type: none"> - Learning about the effects of the schoolLink programme for the schools - Finding a balance between the use of subjective and objective assessment criteria - Monitoring change in behaviour of school actors - Analysis of large number of attachment reports - Limited information about the programme's effects related to change in knowledge, attitudes and behaviour of the students - Learning from the effects of educational programmes - Exploring monitoring tools that are suitable for the specific target groups of young grade three school pupils and students in vocational and technical secondary schools - Monitoring and learning from the effects of the education activities in a context of limited contact with the final target group (<i>i.e.</i> the youth) - Limited clarity about programme objectives - Monitoring and learning form effects of the programme due to short term contact with target groups. - PME mainly at activity and financial level - Limited clarity about programme objectives which are formulated rather broad: <i>e.g.</i> promotion of equity, changing the way Belgian public look at other parts of the planet - Difficult to motivate team for PME as most of the team consists of volunteers - PME mainly at activity and financial level - Limited clarity about theory of change and programme objectives - Target groups not well specified - Participation to the action research took place in the framework of an external evaluation of their campaign approach (evaluation conducted by HIVA) - No specific PME system for development education interventions 	<p>Outcome Mapping and Most Significant Change</p> <p>Most Significant Change and questionnaires</p> <p>Questionnaires for vocational/technical students</p> <p>Development of observation and analysis tool</p> <p>Interviews with visitors to the film festival with specific questions around the programme's effects</p> <p>Clarifying theory of change according to spheres of influence (<i>i.e.</i> element of outcome mapping)</p> <p>Clarifying theory of change according to spheres of influence (<i>i.e.</i> element of outcome mapping)</p>

3 | Dealing with the complex nature of development education interventions

The unpredictable nature of human behaviour, linked as it is with the multitude of interacting relationships between various actors, makes social systems and therefore social development processes complex (Woodhill, 2008). This realisation has important implications for planning, monitoring and evaluation as it questions the relevance of results based planning models that assume linear cause-and-effect relationships and predictable outcomes when dealing with complex situations.

3.1 No linear relationship between knowledge, attitudes and behaviour

The objectives pursued by development education interventions can be considered as complex as they are determined by a multitude of factors such as knowledge, attitude, behaviour and context which are not related to each other in a linear way. As a result, unexpected and unpredictable factors can have an important effect on the effectiveness of well planned development education activities (see Textbox 1).



Textbox 1

In one PME workshop we made use of the typology of Crawford and Pollack (2004) to visualise the complex reality of development education activities through 7 characteristic dimensions (see caption). Based on the answers of the workshop participants, we got the following typology for development education interventions: (1) limited goal/objective clarity, (2) less tangible objectives, (3) less quantifiable indicators, (4) more easily affected by factors outside the project control, (5) higher number of possible intervention strategies, (6) more need for active engagement of stakeholders and (7) more focus on relationships, culture and meaning instead of technical performance and efficiency. The figure above shows the average scores on a scale of 0% (low agreement) and 100% (high agreement) that were given to the different typologies by 22 participants to the workshop.

Liddy (2010) refers to the importance of the historical and social context in which development education takes place as this will affect how learners build on their existing understanding of the world and how they will act. Mowles (2010) also used the importance of the historical and social context, as well as power within a particular setting, to explain how seemingly small differences between locally interacting agents can have unpredictably large population-wide effects, and why the effects of similar activities can be dramatically different. Hence, unexpected and unpredictable factors will affect how learners respond to development education activities.

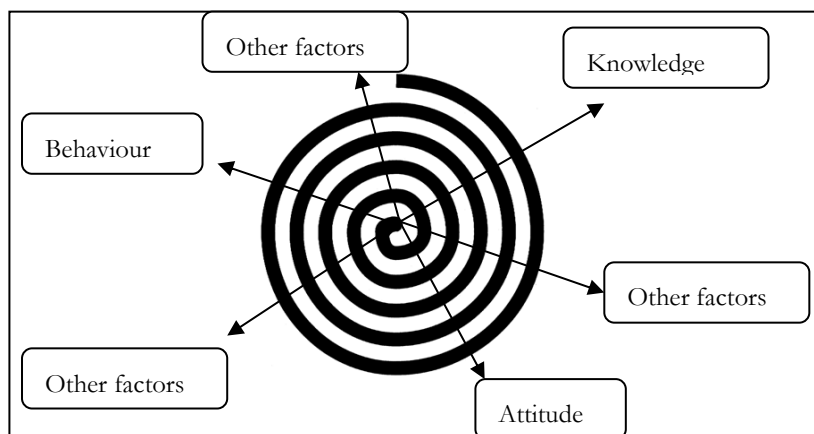
Interestingly, the complexity of development education processes also emerged from quantitative survey research into the relationship between the dimensions of the education continuum (*i.e.* knowledge, attitudes, and behaviour) underlying public awareness about development cooperation and global solidarity. Kinsbergen and Schulpen (2009) illustrated that the relationship between attitude and behaviour is not necessarily positive. The researchers demonstrated that people with a positive attitude towards development cooperation donate less or engage themselves less. In contrast, another public poll carried out by HIVA in Belgium (Pollet, 2010) shows a strong positive relationship between attitude about development cooperation and donating funds and somehow contradicts the interpretation by the Dutch researchers that the public may engage themselves less because they feel that government is already doing enough. Also an increased knowledge about development cooperation will not necessarily guarantee a more positive attitude. While several studies have shown that increased knowledge does not lead to a more negative attitude or less engagement (Kinsbergen & Schulpen, 2009; Pollet, 2010), the link between knowledge and a positive attitude and stronger engagement has shown to be rather weak (Pollet, 2010). The public seems to be able to form its own attitude about a specific issue of development cooperation without necessarily having adequate knowledge about the issue (Develtere, 2003). This has resulted in some policy makers to question the need to focus on public support activities that seek to strengthen knowledge (IOB, 2009). On the other hand, knowledge about the Millennium Development Goals (MDGs) was found to be positively linked with the willingness to donate more money or to be involved more actively in one way or another (Kinsbergen & Schulpen, 2009). Also, an impact study about development education in Flemish schools by the centre of experiential learning (Laevers *et al.*, 2010) showed a strong positive link between knowledge about NGOs and competencies related to global citizenship by 12 to 18 year olds. The same study, however, showed that pupils often keep a stereotypical image of the South whereby it remains difficult to apply the acquired knowledge through development education activities in concrete cases.

Textbox 2: wearing seat belts

It took public policy to require that seat belts be included in vehicles. Then campaigns were conducted to inform and educate the public about using seat belts. But communications campaigns that asked people to buckle-up had only limited success. Refinements lead to a deeper understanding of the problem that links individual behaviour to the broader policy environment. Seat belt use increased dramatically only after primary enforcement laws were in place. The issue moved from policy to personal behaviour back to policy (Dorfman *et al.*, 2002, p. 15).

Furthermore, the influence of different dimensions of the education continuum (knowledge, attitude and behaviour) can shift between each other over time. This is illustrated by the ‘wearing of seat belts’ campaign in Textbox 2. Drawing from this example we can represent the possible influence of knowledge, attitude, behaviour and possibly other factors, on the public support for a certain issue, in the form of a spiral instead of a linear continuum (see Figure 3.1). A spiral represents better how knowledge, attitude and behaviour may play a role at various times in shaping the ‘public support’ of any individual or actor (organisations, institution, ...) for a certain object (*e.g.* global citizenship) and how these elements can influence each other over time. The spiral also helps to visualise that other factors can play a role such as people’s sense whether they personally are in a position to do something about the issue, their view about what is a socially acceptable response within the community and amongst groups that they belong to or aspire to belong to, public policy, *etc.* (Coe & Mayne, 2008).

Figure 3.1 Spiral model of influencing public support (based on Dorfman, 2002)



The implication of this complexity for PME is that it makes sense to have - and therefore to monitor - objectives across a range of outcomes (*e.g.* knowledge, attitude, behaviour, ...) and to be on the lookout for a range of possible effects your activities are likely to generate, and possibly the connections between these outcomes. Another implication is that objectives of development education activities may shift over time (Coe & Mayne, 2008, p. 32). In the ‘wearing seat belts’ example focus shifted from behaviour to policy, and back to behaviour once the policy was in place. In addition, result based management approaches that follow a linear planning logic such as the logical framework approach may pose challenges for managing the results of development education interventions. This is because the results of such interventions cannot be treated as problems that can be solved through rigorous analysis and thorough planning (*e.g.* SMART indicators: Specific, Measurable, Attainable, Realistic and Timely). Instead a learning oriented management approach that stimulates learning about expected and unexpected results and allows the adjustment of the intervention according to the lessons learned may be more appropriate.

3.2 Not all aspects of development education interventions are complex

While the objectives of development education are generally complex in nature, not all aspects of our development education interventions will have the same level of complexity. The Cynefin framework (see Figure 3.2) developed by David Snowden and Cynthia Kurtz (Kurtz & Snowden, 2003) is a ‘sense making or decision making’ framework which helps organisations to differentiate

between situations or processes that are ‘simple’, ‘complicated’, ‘complex’ or ‘chaotic’ and make decisions accordingly.

Figure 3.2 Cynefin framework (developed by David Snowden, www.cognitive-edge.com)



It is important to make this differentiation when developing planning, monitoring and evaluation systems because different action responses will apply for different levels of complexity. Below we explain briefly each dimension of the Cynefin framework and try to illustrate each with an example. We have adapted some of the examples that were given by Van Der Velden (2010).

Simple refers to situations where cause and effect are obvious, repeatable and predictable. The approach is sense - categorise - respond.

Example: organising a petition on the street around a specific theme for which you tell people the background story and then ask them to sign the petition. Getting the petition organised could be simple. Whether people will sign and whether the petition will have an influence on their attitude about the issue or on their behaviour would not be part of the ‘simple’ domain. Simple quality standards and following a protocol of best practices could be enough to ensure the petition is properly organised.

Complicated refers to situations where cause and effect are detectable but separated over time and space. Some expert knowledge or investigation is needed to establish the cause and effect relationship. The approach is sense - analyse - respond. Good practices can be developed for such situations.

Example: the implementation of development education modules in primary school that provide a framework for children to engage with a number of North-South issues, in order to promote a certain level of knowledge or attitude around these issues and to facilitate some simple action such as a theme walk, reading a book about another culture or doing a twitter session on internet around a relevant theme. Within the parameters of the school, you still have a certain amount of control to make sure that the children actually participate in all the activities.

Complex refers to situations in which cause and effect is understandable in retrospect but cannot be predicted and is often unrepeatable. Frequently it is also undetectable because of the multitude of external factors and actors that cannot always be known or understood. The approach in complex situations is probe - sense - respond. This involves the emergent practice of trying out specific interventions and then learning what works and what doesn’t work. On the basis of that knowledge one can then respond by scaling up or replicating (Woodhill, 2008).

Example: a development education campaign that aims at changing people's behaviour towards buying more sustainable products such as Max Havelaar Coffee because of a changed attitude about the effect of consumption in the North on conditions in the South.

Chaotic refers to situations in which the relationship between cause and effect is not detectable. In such situations there is often no time for planning and one needs to act immediately (*e.g.* in emergency situations after natural disasters). The approach is to act - sense - respond.

Example: the NGOs being confronted with a sudden decrease in funding from government because of a perception that they were not able to account for the effects of their activities. NGOs now frantically seek to improve their PME practice at any cost.

The central part, 'disorder', represents the space of not knowing which domain we are in. In such case we will interpret the situation on the basis of our personal preference for action. This can sometimes result in making a decision for a specific action that is not appropriate for the situation, *e.g.* addressing a complex problem with a complicated action response.

Often, a single programme may contain different domains of the Cynefin model and each domain, be it simple, complicated, complex or chaotic will require different PME approaches (Rogers, 2008).

3.3 Implications of complexity for PME of development education initiatives

The complexity of development education processes has some practical implications for PME. First, results-based management approaches that follow a linear planning logic, assuming a linear causal link between cause (activity) and effect (outcome or impact), will be less relevant for managing the results of development education interventions because the results of such interventions cannot be treated as problems that can be solved through rigorous analysis, planning, and the formulation of SMART indicators. SMART indicators run the risk of missing the unexpected effects that will occur as a result of the many unforeseen and uncontrollable factors that inevitably contribute to any outcomes. It will also be hard to predetermine targets or timing for change that cannot be predicted. Furthermore, the diverse and often intangible effects related to individual intentions and understandings (Hunt, 2013) will be difficult to capture with one standardised monitoring framework (Bracken & Bryan, 2010).

In view of the aforementioned implications, standardised quantitative survey instruments, while providing a workable and quick means of assessing knowledge, attitudes, or behavioural change over a large number of people, seem rather inadequate to draw rich lessons about the impact of development education interventions and the factors that contribute to it (Bracken & Bryan, 2010; Hudson & Van Heerde, 2012). Also, the often weak theoretical concepts and lack of an empirical base - in the form of agreed-upon good practice in development education - is another challenge for designing PME approaches based on predefined criteria on quality (Scheunpflug, 2008). A subjective dimension toward evaluation and measurement in development education might be more appropriate, as compared to '*an objective stance associated with functional measurement approaches*' (Liddy, 2010: 3). Instead of abstracting the actors in the development education process, it positions them and their learning centrally in the PME process. It can also help counter the risk of diverting attention away from results that are less easily quantifiable, following the increasing emphasis on results (Bracken & Bryan, 2010).

In the next sections we discuss how a deeper insight about the purpose and theory of change of a development education programme forms an important basis for developing learning centred

planning, monitoring and evaluation systems that can better deal with the complex nature of the learning objectives that such programmes often pursue.

4 | Clarifying the objective or the purpose of development education programmes

A good understanding of what we mean by development education may be a minimum requirement to be able to monitor and evaluate the effects of development education activities. Reality however shows that the field of development education in Belgium (and internationally) is a rather diverse and complex landscape of various programmes, actors and approaches that are known under an equally diverse array of different definitions (Debruyne *et al.*, 2011). In the Dutch speaking part of Belgium, development education has often been referred to as 'Draagvlakversterking voor Ontwikkelingssamenwerking', which can be translated as raising public support for development cooperation, and can be defined as the combination of attitudes and behaviour, whether arising from knowledge or otherwise, regarding development cooperation (Develtere, 2003). Organisations and governmental agencies in the whole of Belgium also refer to 'North' activities (in contrast to their 'South' activities which take place in developing countries) to encompass all development education activities which are aimed at the Belgian public. A challenge with the above definitions is that they are very much open to interpretation. This results in limited clarity about the objectives of development education initiatives (see also Textbox 3).

Textbox 3: limited clarity about the objective of development cooperation

A study on the influence of programmes that seek to strengthen public support for development cooperation in the Netherlands, observed ongoing confusion about the object for which organisations seek public support and the effect of this public support on that object (Verduijn, 2009). Verduijn identified the following objects for public support that were often not fully clarified:

- development cooperation in general: this is a common but very broad and unspecific object which can constitute many different things such as public support for an integrated concept of development (i.e. development is not only an issue in the South but also in the North), public support for world citizenship (i.e. wereldburgerschap), public support for a sustainable world, public support for the principles of development cooperation, ...;
- specific objectives related to specific thematic issues in development cooperation (e.g. MDGs, gender programmes, ...) or specific projects for which support can be sought;
- public relations of the own organisation (e.g. fundraising, own publicity, ...);
- policy (e.g. 0.8% budget spending on development cooperation).

The wide variety of different definitions and interpretations pose a considerable challenge for monitoring and evaluation as they rather vaguely refer to general concepts of international development cooperation and support for development cooperation policy. Hence, they don't necessarily help organisations to clarify the objectives of their development education activities. A study by the Dutch Ministry for example, showed that it was not uncommon that Dutch development organisations hadn't fully clarified the objectives of their development education programmes during the planning stage (IOB, 2009). Such instances were shown to contribute to confusion about the expected results and the pathway (*i.e.* theory of change) to get to these results. Monitoring and evaluation was rather difficult in such situations (*ibid.*).

In recent years, a number of developments have helped to bring some more conceptual clarity about the definition of development education and its broader objectives:

1. In a OECD development centre policy brief, Scheunpflug and McDonnell (2008) identify three different categories of development education activities: (1) development information/communication; (2) advocacy and campaigning; (3) development/global education. These categories do not exclude each other but overlap as they influence society towards social justice but the objectives and rationale underpinning the categories differ as illustrated in Figure 4.1.

Figure 4.1 Typology of development education activities (Scheunpflug & McDonnell, 2008)

	Information/Communication	Advocacy	Development/Global Education
Rationale	Fill knowledge gaps	Policy change	Change individuals; answer learning needs in an interdependent world
Objective	<ul style="list-style-type: none"> • Transparency • Accountability • Gain support for reform • Corporate communication/public affairs: image, reputation, credibility • Contribute to behaviour change 	<ul style="list-style-type: none"> • Advocacy and campaigning to change policies • Mobilise citizens to support change and social justice 	<ul style="list-style-type: none"> • Enable people to live in an interdependent world society and to understand social justice
Key focus for the public	To inform	To engage in campaigning and action	To learn

2. At a European level, the development education monitoring report (Krause, 2010) distinguishes between four understandings of development education that occur in the concepts and practice of diverse development education actors (see Figure 4.2). These include development education as (1) public relations for development cooperation (considered inappropriate by most actors); (2) awareness raising (*i.e.* disseminating information about development issues); (3) global education (*i.e.* aiming at changed behaviour and at enhancing action of the target group for global justice and sustainability) and (4) development of life skills (*i.e.* focusing on the learning process and the enhancement of competences needed for life in the complex and dynamic world society).

Figure 4.2 Four understandings of development education (Krause, 2010)

	Public Relations	Awareness Raising	Global Education	Life Skills
	Not recognised as DE	Recognised as Development Education		
Thematic scope	development cooperation	wider development issues	global interdependency; North-South issues (environmental, economic, political, social)	local and global issues of social ethics in world society (beyond a North-South perspective)
Goal	public support	awareness	responsible action	fulfilling life, social change
Educative approach	"indoctrination"	information	participation; process awareness/experience => understanding/capacity building => action	support/offer; empowerment
Pedagogic thought	commercial	top-down	actor-centred, normative	constructivist, systemic
Target Group	object of PR	recipient of information	subject of a learning process in which normative objectives are given; activist	(dynamic) subject of a self-organised learning process in which results are open; agent of social change
Context	foreign aid	development policy	(recent) globalisation	local community & world society

3. In Belgium, more conceptual clarity around development education was obtained in 2011 through the work of a joint consultation group (*i.e.* Paritair Overleg Comité, POC) with representatives of the federal ministry of development cooperation, the Belgian Technical Cooperation, and Belgian NGOs (DGD, 2011). This committee reached a consensus on the definition of development education which is accepted in both the Flemish and French speaking part of the country (see Textbox 4). Earlier in 2010, the Flemish NGO federation in collaboration with various NGOs worked out a framework for development education in schools which unpacks possible common objectives related to knowledge, competencies and behaviour (NGO federation, 2010).

Textbox 4: definition of development education agreed by the joint consultation group of the Federal Ministry of Development Cooperation, the Belgian Technical Cooperation and NGOs

Development education forms part of global citizenship education. The general purpose of this is to contribute to a more just and solidary world based on democratic values. North-South relations are the focal point of development education.

In a context of mutual dependence between global issues and daily life of individuals and communities, development education establishes processes that have the following aims:

- to promote global insight in the international development issues and to encourage forming critical opinions;
- to bring about a change of values, attitudes and behaviour, both individually and collectively;
- to encourage active practice of local and global rights and obligation;
- to achieve a more just and solidary world.

These processes are based on a coherent and mutually coordinated strategy comprising the following different approaches:

- raising awareness among citizens and communities on development issues and challenges facing North-South relationships;
- making citizens and communities aware of the mutual dependence between 'North' and 'South';
- committing citizens and communities in personal or collective actions for the benefit of a sustainable and just development model;
- mobilising citizens and communities to arrive at more just and solidary local, national and international policy choices.

A clear trend in the international understanding about development education is that it goes far beyond the limits of classic 'development cooperation' and public relations of the own organisation

(Krause, 2010). Critical insights, values and capabilities related to active involvement towards global justice and enhanced solidarity are becoming more prominent.

These deeper conceptual insights that underpin recent definitions can guide practitioners as they specify the objectives of their development education programmes. Textbox 5 illustrates how the deeper contextualisation of development education helped World Solidarity to clarify the objectives of its development education programme.

Textbox 5: clarifying the objectives of your development education programme – World Solidarity case

During a collective reflection with the World Solidarity team on the monitoring data of their International Week Campaign, it emerged that monitoring activities were mainly focusing on strengthening public support for the own organisation. The broader definitions of development education (as discussed in section 6.1) helped the team to realise that the monitoring information didn't provide information about changes in the capacity of member organisations of the Christian labour movement to implement their own development education activities. They also learned that questions about possible change in terms of knowledge, attitudes or behaviour of the participants remained largely unanswered. These insights led to the realisation that the World Solidarity team was not clear about why and how they wanted to influence the labour movement member organisations they are working with. In addition there was no clarity about which changes in knowledge, attitudes and behaviour World Solidarity was hoping to contribute to among their target groups through their international week campaign. This then kick-started a collective process involving all team members to clarify the objectives of their development education programme more in detail and the changes they were hoping to contribute to within their target groups (see Appendix 1 for the outcomes of this process).

The conceptualisation of the objectives of development education proved to be a challenge for organisations that used the arts (music and movies) from various parts of the world to sensitise the public about North/South issues and the need for solidarity. This was particularly the case for the 'Open Doek' film festival and the 'Esperanzha' festival who are aiming *'to open the minds of the public on the common destiny of inhabitants of the World'* (*Open Doek coordinator*). Through their respective festivals they seek to touch the public in their emotions and feelings rather than to provide them with discourses or information. They hope that the emotional sensation provoked by songs, music or movies will generate a feeling of global citizenship that will lead to (any forms of) active engagement. It remained a considerable challenge for both organisations to further unpack this objective in a way that it could help them to develop a practical monitoring system for learning if their programmes were indeed contributing to this objective. The above described typologies around the objectives of development education were felt by the two organisations to run short in addressing the more transformative learning objectives of programmes that work through the arts. This contributed to the fact that eventually no monitoring cycles were implemented during the action research and questions about the effects of these events remained unresolved.

5 | Clarifying an actor centred theory of change

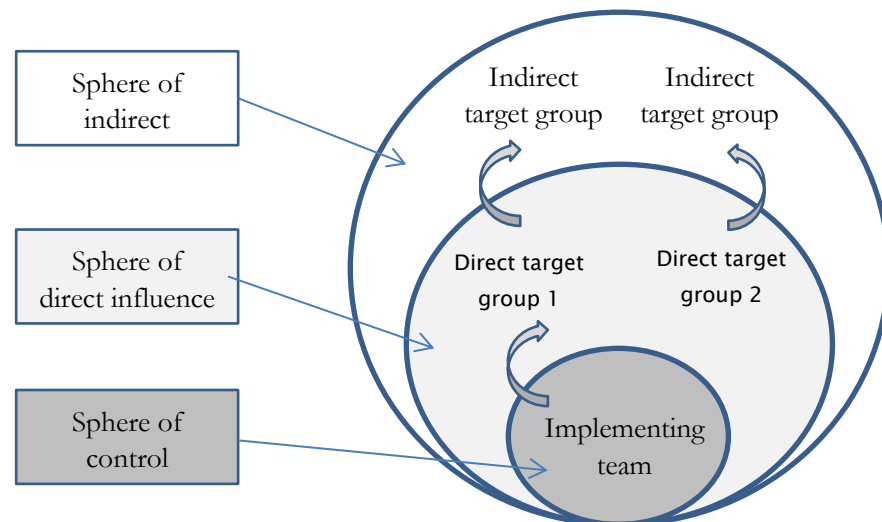
Any planning process can follow a ‘functionalist’ or ‘an interpretivist’ perspective. A functionalist perspective involves breaking down the desired changes into functional elements, *i.e.* the units of work/effort required to bring about the planned change (Crawford *et al.*, 2005). Such planning perspective (as is the case with many of our logical frameworks) have a tendency to abstract the human actors that a project seeks to influence and instead focus on the function or roles of the programme implementation team (*i.e.* project activities). This frequently results in less clarity about the changes to which the project seeks to contribute at the level of the actors whom the implementing team is seeking to influence directly or indirectly (Mowles, 2010). Not surprisingly, a PME system based on such a planning approach will find it easier to monitor outputs of project activities instead of its effects or outcomes. Furthermore, as was observed in a majority of the cases in the action research, change at the level of key actors that play an important role in the achievement of a programme’s results can be missed. In The ‘Change The Food’ programme of Vredeseilanden, aimed at promoting consumption of locally grown foods, it emerged that its PME system was missing observable results at the level of the school administrations and catering services who are important levers for sustained programme results in the schools. Similarly, an overambitious focus on the general public instead of well-defined target groups emerged as a major challenge in the food security campaigns of SOS-FAIM as well as the campaigns of World-Solidarity on labour rights and decent work. In both cases, it emerged that this overambitious focus on the general public was related to a sense of responsibility among both NGOs to sensitise as much people as possible on burning issues which are not addressed by other organisations (*e.g.* decent work and labour rights in the case of World Solidarity and food security in the case of SOS-Faim). Limiting the outreach of their actions to specific target groups (*e.g.* with whom they would have a more privileged and direct relationship) was felt to diminish their potential impact.

An interpretivist perspective to planning on the other hand involves the articulation of the roles and expectations of key human actors involved in the change process. It acknowledges that social change, by definition, involves human actors interacting within a system (Crawford *et al.*, 2005). Planning within such a perspective will involve clarifying and describing specific changes at the level of the actors whom the project seeks to influence directly or indirectly. These changes, to which the project hopes to contribute can provide a framework for monitoring and evaluating the effects of the project. The resulting project plan is sometimes referred to as an actor-focused theory of change. Outcome mapping (OM) is a planning, monitoring and evaluation approach that follows such interpretivist perspective (Earl *et al.*, 2001). Outcome mapping offers a flexible planning framework that focuses attention to changes in behaviour or relationships of those actors that a project seeks to influence directly (see Textbox 6). Outcome mapping doesn’t follow a linear planning logic nor claims attribution as it recognises that other actors and factors beyond any intervention will contribute to an intervention’s results. Its strong actor focus and its emphasis towards ongoing reflection, learning and adaptation make it particularly attractive as a PME approach for dealing with processes of complex change.

Textbox 6: Outcome Mapping (OM) is a methodology for planning, monitoring and evaluating development programmes that are oriented towards social change. OM provides a set of tools and guidelines to gather information on the changes in behaviour, actions and relationships of those individuals, groups or organisations with whom the initiative is working directly and seeking to influence. OM puts people and learning at the centre of development and accepts unanticipated changes as potential for innovation. Outcome Mapping was developed by the International Development Research Centre in Canada (Earl *et al.*, 2001). See also www.outcomemapping.ca.

The five organisations that piloted elements of outcome mapping during the action research indicated that the approach helped them to gain deeper insights about their programme's actor-focused theory of change. Especially outcome mapping's concept of spheres of influence (see Figure 5.1) was found useful in that respect as it helped them to develop a better and more shared understanding of who is situated within a programme's sphere of control (*i.e.* the actors who have control over a programme's activities and resources), in the programme's sphere of direct influence (*i.e.* the actors that are directly influenced by the intervention's activities) and in the sphere of indirect influence (*i.e.* the actors that are only indirectly influenced by the intervention).

Figure 5.1 Spheres of control, influence and interest (adapted from Deprez, 2009)

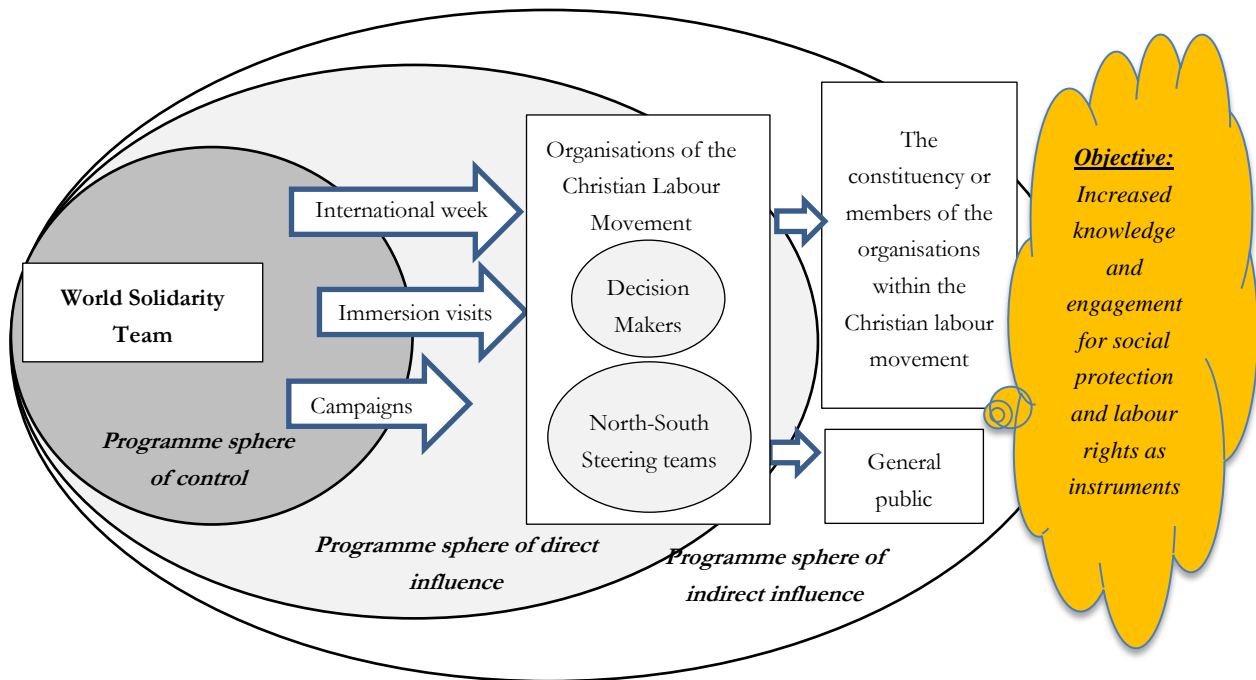


The case of World Solidarity outlined below illustrates how the development of an actor-centred theory of change through OM's concept of spheres of influence helped to strengthen their programme's monitoring and evaluation system.

World Solidarity is the development NGO of the Christian Labour Movement in Belgium. It implements a development education programme that aims at increasing knowledge and engagement for social protection and decent work as instruments to combat inequality. To contribute to this objective, World Solidarity organises annual campaigns around specific issues of social protection. In addition it facilitates 'immersion visits' to its projects in the South for members from the organisations of the Christian Labour Movement such as the Christian Trade Union (ACV) or the Christian Health Insurance Fund (CM). Guests from the South are also invited to give workshops and presentations during World Solidarity's 'International Week' which is organised once a year. Limited goal clarity and limited shared understanding about the expected effects led to considerable challenges for monitoring and evaluation. To address these, the development

education team tried to clarify its programme's theory of change according to the 'spheres of influence' tool of outcome mapping. Figure 5.2 summarises the result of this exercise.

Figure 5.2 Simplified representation of the actor-centred theory of change of World Solidarity Belgium



Conducting this exercise helped the team to realise that they were only indirectly influencing the final target groups situated in the sphere of indirect influence (*i.e.* the constituency or members of the organisations within the Christian Labour Movement and the general public). It became clear that their direct influence was limited towards the actors in the programme's sphere of direct influence such as decision-makers and the North-South steering teams within the organisations of the Christian Labour Movement. This realisation opened up a new result level where effects in the direct target groups could be monitored. Monitoring at that level had been neglected in the past as it had been mainly focusing on change in the actors situated in the programme's sphere of indirect influence. Furthermore, clarifying the different actors in the different spheres of influence also helped to gain a better understanding about the effects that the programme hoped to see within these target groups. This led to the insight that the envisaged effects within the direct target groups were more related to capacity development regarding the implementation of development education activities. Effects in the indirect target groups were more related to the objectives of development education regarding knowledge, attitude and behaviour in relation to North-South issues. These two different groups of effects also emerged in the other cases that participated in the action research and who managed to clarify their theories of change.

While clarifying an actor centred theory of change is an important step for designing a more effective and learning oriented PME system, it doesn't provide a guarantee that such PME system will eventually be developed. This still remains the responsibility of the programme team. In the case of Esperanza and Open Doek for example, the clarification of their respective theories of change didn't result in the development or implementation of a full monitoring system in the time

frame of the action research. This was partly due to their programme's rather broad and ambitious objectives as highlighted above in section 4.3. In the case of SOS Faim, mapping the actors in the different spheres of influence helped to confirm an already implicit feeling among staff about the discrepancy between the range of actors that the NGO intends to sensitise, the expected changes at the level of each of these actors and the strategies implemented. The exercise also made clear that most strategies implemented by SOS Faim are directed to the general public and in a more limited way to some intermediary actors who are able to influence other actors in the sphere of interest. At the same time by the end of the action research, it was not clear if these insights had informed adjustments to the PME system of the programme.

6 | Planning for data collection and data analysis

Measuring the effects of development education programmes remains a challenge for many organisations. In the majority of cases participating in the action research PME tended to be limited to monitoring the outputs of programme activities such as the number of people that attended a specific event or activity. Monitoring the effects or impact over time of such activities is perceived as much more difficult, as illustrated by the following quote from one NGO representative: *'Many NGOs face difficulties in setting up a solid research about their impact and the effects of their activities. The fact that many NGOs don't have staff with a research background is the main reason for this. ... NGO's are not motivated to develop their own monitoring system because they are of the opinion that this can only be done well if lots of time and expertise is invested in it'.*

Based on the intermediate results of the action research we want to argue that PME of the effects of development education activities doesn't necessarily require sophisticated academic research capacity. While some level of PME capacity is needed among the staff involved in the development education intervention, also important is the availability of an actor focused theory of change as was highlighted in the previous section. Such theory of change was shown across the different cases to provide the basis for making the necessary decisions regarding the most suitable PME approaches for specific types of interventions, effects and target groups.

From the theories of change that were developed in the cases participating in the action research, the following two different groups of effects emerged that required different PME approaches: (1) effects related to capacity development of organisations that are directly influenced by the intervention with a view of strengthening them to implement development education activities and (2) changes in knowledge, attitudes and behaviour of people influenced directly or indirectly by the development education intervention. Below we elaborate on the methodological implications of these two groups of effects for PME practice.

6.1 Monitoring capacity development in development education projects

Capacity development in relation to the better implementation of development education activities emerged as a major objective within the development education interventions of the action research cases. Changes in capacity are therefore important effects that can be monitored. As we already saw earlier in the article, World Solidarity sought to strengthen the capacity of the decision makers and the North-South steering teams within the organisations of the Christian Labour Movement to implement development education activities with their respective target groups. Similarly, a school link programme implemented by the Flemish Organisation for Development Cooperation and Technical Assistance (VVOB) aimed at strengthening the capacity of the schools to sustain their respective links with schools in the South and to implement development education activities for the pupils. Both cases used the concept of progress markers from the outcome mapping methodology to develop a monitoring framework for these capacity development processes. Progress markers describe observable changes in behaviour or relationships of the actors whom a programme seeks to influence directly (Earl *et al.*, 2001). For each actor, a set of progress markers is usually developed which consists of changes that represent an early response to the intervention's

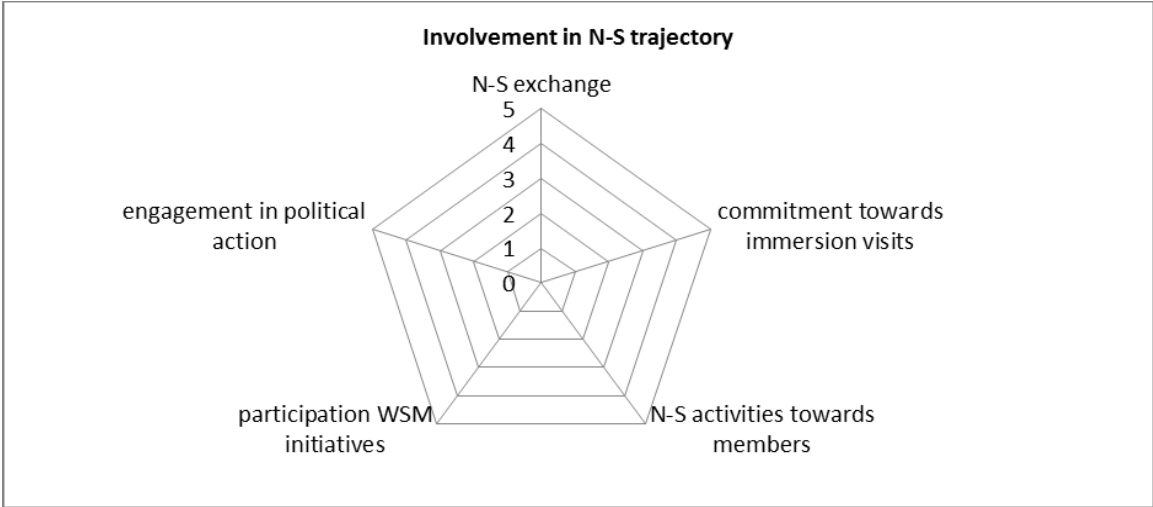
activities (*i.e.* expect to see progress markers), changes that are more involving (*i.e.* like to see progress markers) and more profound changes (*i.e.* love to see progress markers). As a set, progress markers illustrate the complexity of the change process. They differ from SMART indicators in the sense that they are not necessarily time-bound nor specified with pre-set targets. Only when they materialise, as observed during the monitoring process, can the timing and specifics become clear. Progress markers are therefore not supposed to be used as rigid targets against which progress is measured. Instead they provide a framework for dialogue or reflection on progress and they can be adjusted during monitoring cycles (Earl *et al.*, 2001). Table 6.1 illustrates the progress markers that World Solidarity Belgium developed for the organisations of the Christian Labour Movement whom they support directly.

Table 6.1 Illustration of progress markers for one of the direct target groups of World Solidarity Belgium

World solidarity ‘expects to see’ the organisations of the Christian Labour Movement	
1	Participate as a partner in the campaigns organised by World Solidarity
2	Propagate and share information received by World Solidarity among their staff
World solidarity ‘likes to see’ the organisations of the Christian Labour Movement	
3	Allow their staff to participate in training sessions organised by World Solidarity
4	Integrate international solidarity in their mission
5	Delegate staff to be involved part-time in development education activities
World solidarity ‘loves to see’ the organisations of the Christian Labour Movement	
6	Organise their own development education activities
7	Implement a fair trade policy

The World Solidarity team indicated that the process of developing the progress markers had enhanced their understanding of the change to which they hoped to contribute and as such had helped to refine the actor-focused theory of change of their development education programme. At this stage in the action research, the progress markers were used to inform the construction of different analytic dimensions of monitoring tools to track the involvement of WSM’s direct target groups in a North-South trajectory (see Figure 6.1). These tools, which would be further tested in WSM’s new programme (2014-2016), are supposed to guide in-depth discussions among WSM staff based on observed facts and experiences related to changes within member organisations.

Figure 6.1 Scoring tool for monitoring level of involvement in N-S trajectories



In the VVOB school link programme, progress markers were formulated to monitor progress in the capacity development process of the schools. It was decided that change at the level of the individual pupils would not be monitored on a regular basis as this was seen as unpractical and too involving. Also, it was assumed that positive change at the level of the schools would indirectly have an effect on the pupils. Another reason was the fact that effects at the level of the pupils would take too long to materialise and would be too difficult to attribute to the programme due to the influence of many other factors. Interestingly, VVOB customised the progress markers tool by formulating more general categories of progress markers. VVOB also didn't use the 'expect to see', 'like to see' and 'love to see' concept when it formulated progress markers. Some examples of the progress marker categories for the schools are shown in Textbox 7.

Textbox 7: extract of progress markers categories for schools involved in VVOB's school link programme

1. the school management actively supports the school link;
2. the teachers are actively engaged in the school link;
3. there is internal communication about the school link within the school;
4. there is communication about the school link between the partners of the school link.

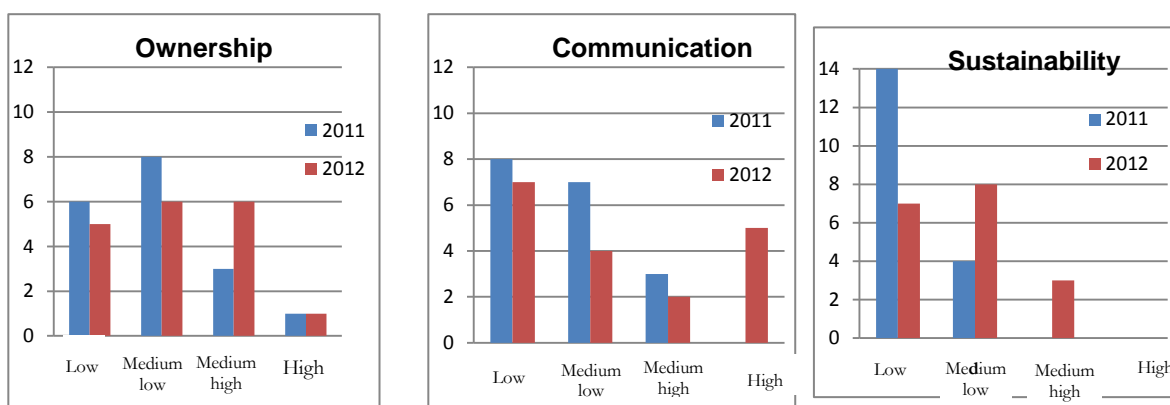
Furthermore, for each progress marker category, VVOB developed a rubric that consists of four statements that describe criteria for assessing different levels of performance within a progress marker category. This helps to make the process of synthesising evidence into an overall evaluative judgement more transparent (Rogers, 2013). An example of a progress marker and its accompanying rubric is shown in Table 6.2.

Table 6.2 Illustration of one progress marker category with associated rubric in VVOB's school link programme

Progress marker category: the school management actively supports the school link		
1	School management supports the initiative, but is barely informed about the implementation of the school link.	Low (=1)
2	School management supports the initiative, is informed about it but is only involved in a limited way, (e.g. management receives reports of meetings pertaining to the school link).	Medium/Low (=2)
3	School management is actively involved (participates in work meetings and training sessions, acts as a communication partner, participates in visits of the sister school, ...).	Medium/High (=3)
4	School management acts as pacemaker of the school link initiative. (motivates other teachers, stimulates activities, looks for additional funding, involves parents and the school board, ...).	High (=4)

The progress markers are used by VVOB staff as an analytic framework that guides their reflection on the monitoring information. This monitoring information is collected through personal observations during school visits, informal feedback and testimonies from teachers and activity reports from the schools. Each monitoring cycle results in qualitative monitoring information in the form of comments and recommendations as well as quantitative scores for each progress marker category for each school involved in the programme. The scores allow the programme to visualise the baseline situation and eventual trends for each of the progress marker categories at school level but also at a more aggregated level across the various schools. Such aggregation is illustrated in Figure 6.2 which shows the number of schools according to their average scores for three progress marker categories (*i.e.* ownership, communication and sustainability).

Figure 6.2 Number of schools according to their average scores for three dimensions of their school link resulting from monitoring cycles in 2011 and 2012



After having used the progress markers for one year, VVOB staff highlighted a number of advantages and challenges that are shown in Table 6.3. It was observed that the progress markers had helped the VVOB team to develop deeper insights into the programme's theory of change and to strengthen or adjust their support for the schools. The progress markers were therefore perceived by the VVOB staff to be useful for strengthening the school links. Furthermore it was reported that the progress markers had helped VVOB to report to the donor about the programme's progress to its specific objective. The challenges were mainly situated around the effort needed for regular follow-up of the progress markers, the process of making evaluative statements about them and concerns about the robustness of the approach for impact evaluation.

Table 6.3 Advantages and challenges associated with the use of progress markers in VVOB's school link programme

Advantages	Challenges
<ul style="list-style-type: none"> - Developing the progress markers helped to refine the theory of change of the school link programme. - Helped to develop a clearer understanding about the results we hoped to achieve. - Helped to structure VVOB's support towards the schools. - Contributed towards more focused and structured advice from VVOB towards the schools. - As indicators of progress they were found useful to make decisions about continued support of specific school links. 	<ul style="list-style-type: none"> - Systematic analysis of monitoring information from school reports and field visits according to the progress markers and translating this into scores takes time and effort. The added value of this effort as compared to a more subjective general appreciation as was done in the past wasn't yet fully clear for the VVOB staff. Some added value in the short term was seen in the fact that they could now claim that their monitoring system was more robust. This was seen to be important towards external stakeholders such as the donor. VVOB considered it too early to make statements about the added value in the long term. - There was concern about the element of subjectivity when making evaluative statements about the progress markers. It was explained that VVOB staff is not always able to directly observe the situation concerning certain progress markers but are sometimes dependent on the information that stakeholders give them with the risk of describing a more positive picture of the situation because of the social desirability element. This was felt to be even more challenging because of the reality that VVOB is both supporter, donor and evaluator. - Analysis of the various progress markers across the different school links was felt to be challenging. - For the purpose of impact evaluation it was felt by VVOB staff that the regular monitoring through the progress markers needed to be complemented with surveys for teachers and pupils.

6.2 Monitoring changes in knowledge, attitude or behaviour

A second group of effects relates to changes in knowledge, attitudes and behaviour of the target groups of development education interventions. Monitoring such effects proved to be a challenge for a majority of cases in the action research. One of the main reasons was the limited conceptualisation of the expected effects of the interventions. In such cases, programme teams would face problems to conceptualise the kind of change to which they seek to contribute as well as to design data collection tools to monitor change among the target groups. Also, the analysis of the monitoring data would pose problems in such situations because of the lack of an analytic lens to look at the data. Interestingly however, in those cases where an effort was made during the action research to clarify their theory of change, we saw evidence that programme teams were able to customise and implement a variety of PME approaches, such as customised scoring tools, questionnaires and most significant change, which helped them to monitor and learn about their programme's effects on a more regular basis. Below we discuss how a scoring tool was used in the case of Trias to monitor changes in knowledge, attitudes and behaviour among its partner organisations in Belgium and in the South. We also go into more detail on the experiences with the use of most significant change methodology in the cases of VLIR UOS and VVOB and the use of questionnaires in the cases of VLIR-UOS and BOS+.

6.2.1 Customising a scoring tool for monitoring changes in knowledge, attitude and behaviour

TRIAS developed a scoring tool (see fig. 6.3) to monitor change in knowledge, attitude and behaviour of the Belgian and Southern partner organisations it supports in their interaction and cooperation with each other. Similar to the rubric discussed above in the VVOB case, the scoring tool contains a number of statements that describe criteria for assessing different levels of performance within different dimensions of knowledge, attitude and behaviour. The statements provide a framework to reflect on monitoring information which is collected in the form of personal observations by Trias staff, activity reports and focus group discussions (see Textbox 8) with groups of administrators, staff and volunteering members from the partner organisations both in the North and the South.

Textbox 8: extract of the lead questions for the focus group discussions

1. What do you know about the partnership? What do people in the movement know about the partnership?
2. To what extent is the partnership alive in the movement? How do people react to this? And why?
3. How do people get to know about the partnership and how do they get in contact with it? Is the link being made between supply, communication and exchange and do people appreciate this? And why?
4. How is feedback about the partnership organised within the movement? Is there enough feedback? Does the partnership contribute to participation in the programme of Trias? In which way? What opportunities are there to be involved in the partnership? Are there enough opportunities for participation?
5. Is the partnership seen as a formal or informal exchange? Why so? Any challenges?
6. To what extent is the partnership playing a role in the planning of the movement?
7. ...

Each dimension of the scoring tool can be scored on a scale from 0 to 10. The specific descriptions of change associated with score values help the scoring during each monitoring cycle. Besides giving a numeric score, there is also room to provide an explanation why a specific score was given. The scores together with the qualitative justifications are used during collective reflection meetings where progress among the various partners is discussed with the whole Trias team. The scores are also aggregated across the various dimensions to get one value for each of the main indicators of

knowledge, attitude and behaviour per partner organisation. These aggregated values help the team to visualise trends over time and assist them in their reporting to their main donor, the Belgian Ministry of Development Cooperation. An extract of the scoring tool is illustrated in Figure 6.3.

Figure 6.3 Extract from the Trias scoring tool

	1	2	3	4	5	6	7	8	9	10		
											Score	Explanation
Knowledge												
Understanding of development cooperation	A minority of the focus group knows different elements of North-South cooperation				Half of the focus group knows different elements of North-South cooperation			A majority of the focus group knows different elements of North-South cooperation			<input type="text"/>	<input type="text"/>
Understanding of the context in North and South	Stereotypes and outdated views on context of MBOs in North or South still exist among a majority of the focus group				More accurate insights in the context of MBOs in North or South exist among the focus group			A majority of the focus group has more accurate insights in the context of MBOs in North or South			<input type="text"/>	<input type="text"/>
Attitude												
Image about solidarity with the North or the South: relations with the North or the South have an added value for both parties	The majority of the focus group has no idea or very limited idea of what the added value of a partnership with other MBOs in North or South can be				A majority of the focus group mentions an added value for one of the parties in the relationship.			A majority of the focus group sees building relations and partnerships with other MBOs in North or South as an added value for both parties			<input type="text"/>	<input type="text"/>

A reflection session by the Trias coordinators about their experiences with the scoring tool after two years of implementation pointed towards some specific advantages but also some pertinent challenges related to the use of the tool and the organisation of focus groups which was seen as the most suitable method to collect information about changes in knowledge, attitude and behaviour of the partner organisations (see Table 6.4).

Table 6.4 Main insights from reflection on the use of focus group discussions and scoring tool

Advantages	Challenges
<ul style="list-style-type: none">- The use of the focus groups helps to collect information about effects of the programme in terms of changes in knowledge, attitude and behaviour of the partner organisations.- People appreciate that they can give input and that they are listened to.- Follow up during focus groups on expectations and concerns mentioned in the previous year can strengthen participation in the process.- Volunteers find the focus groups a rich learning opportunity. They are prepared to invest time in it. At the start it is often questioned what will come out of the focus group but in the end, two years in a row, it has been an interesting and insightful experience.	<ul style="list-style-type: none">- Partner organisations have limited time available to invest in focus group discussions.- Sometimes there is a feeling that the focus groups overlap with other PME activities. Therefore they are seen as extra work.- Partner organisations sometimes doubt whether their input during focus group discussions is valuable or important enough.- It sometimes seems more interesting for Trias than for the partner organisations.- It is questioned whether the focus groups with a limited number of people are adequate as a tool to get a broad idea about the effects in the partners.- Sometimes it is difficult to decide which score to give. Also, the qualitative descriptions of change that come with the various scores can sometimes be interpreted in different ways.

The advantages and disadvantages shown in Table 6.3 point towards three contradictions which are interesting because they highlight three practical dilemma's for results based PME.

- A first contradiction is the perception that the focus groups are mainly useful for Trias and not for the partners *versus* the observation that the partners do find the focus group discussions an interesting and insightful experience.

This contradiction points towards the sometimes difficult balance between the accountability and learning agenda for PME and whether the PME process constitutes a learning process among the different stakeholders or if its main purpose is to extract information from stakeholders to satisfy upward accountability requirements. The feedback from the partner organisations learns that the monitoring process runs the risk of being perceived as too extractive. While the basis for learning seems to be there, more might need to be done in terms of transparency and feedback about what happens with the lessons learned during the monitoring process and involving partners in making decisions about how these lessons may be used to adjust the programme. Since different stakeholders may have different agendas for PME, it will be necessary to be clear about these agendas and to negotiate these various purposes of the PME activities.

- A second contradiction is the fact that people appreciate that they can give input and enjoy being listened to *versus* the feeling that their input during the focus group discussion may not be valuable or important enough.

Self-assessment can be a feasible and powerful tool for monitoring and evaluation. This is because the actors whom a programme is trying to influence are often in the best position to identify meaningful change. The contradiction shows that people find it exciting to be part of such a self-assessment process on the one hand but sometimes have doubts about the significance of their stories or contributions. Such observation helps to highlight an important aspect of a learning-centred self-assessment processes, namely the idea that not all our stories need to be grand narratives. In fact stories can also be accounts of the simple things in life and may comprise a single

anecdote that holds significance for the writer or the teller. Such stories contain the seeds for real learning (Hill, 2010). Good facilitation will be helpful, not only to create the safe environment and focus for people to share their stories, but also to make sure there is the necessary organisational time to do it well (James, 2009).

- A third contradiction involves the observation that the focus group discussion does provide information about the effects of the programme *versus* the concern that the scoring of the scoring tool may be subjective.

This contradiction relates to the question of whether Trias needs to adopt an objective or an interpretive approach. As we have seen earlier in the paper, any process involving change in knowledge, attitude and behaviour related to the objectives of development education can be considered as complex. Objective measures to make evaluative statements may be less relevant in such contexts. Instead, different interpretations might benefit the learning process about the programme's contribution to learning about global issues (Bourn, 2011). It is therefore important that different perspectives can be heard and explored on an in-depth basis during the focus group discussions or reflection meetings. When scoring is done on the basis of such perspectives, it will also be more useful to use these scores as a basis for further reflection than to take them as objective truths. This way it can provide the necessary information to build up a well-supported argument or judgment about progress and learning in the programme. Another example of an analytic framework to monitor effects related to knowledge, attitudes and behaviour is given in textbox 9.

Textbox 9: Monitoring the effects of Globelink's KRAS programme

An additional example of an analytic framework for monitoring the effects related to knowledge, attitudes and behavior is provided by Globelink's KRAS programme. This programme engages third-year secondary school pupils in discussions and role-plays around global development issues. In 2012-2013, more than 600 pupils from 23 different Flemish cities worked around Children Rights. The 9-month discussion process involves three stages: (1) Introduction to the topic and to debate techniques; (2) Role-play: each participant endorses a specific role (e.g. representative of political party, enterprise, NGO, government, press, interest group) and tries to convince other participants of his/her position; and (3) sharing of personal opinions and presentation of recommendations for policy makers. Participants express and defend their own opinion, first within their own group and later during a closing session at local level where all groups of a same region gather. Finally there is an overall closing session with all participants from all locations which takes place in the Belgian Parliament, Senate and the Flemish Parliament where the policy recommendations are shared with Belgian politicians. Globelink relies on accompanying teachers to monitor how students' behaviors and skills evolve along the process during the sessions at local level. In order to ensure comparable measurement, Globelink developed a monitoring tool to track the development of 5 specific skills among the participants, i.e.: new knowledge, systemic thinking, values development, dealing with emotions, active engagement. Indicators were elaborated for each skill to assess how specific skills develop among each group of participants. A summarized version of the monitoring tool is presented in Appendix 5. During the action research, this tool has been used with three groups of pupils during their role play and discussion sessions and during reflection sessions between Globelink and the accompanying teachers. Globelink's main aim of the monitoring process is to use the detailed observations made during a first monitoring cycle to fine-tune the dimensions or indicators of the analytic framework. This way it seeks to gain deeper insights both at process level (how participants learn to debate and build arguments) and at the outcome level (do participants acquire new skills?). While the Globelink team made some considerable progress in the design of their monitoring system, results from the implementation of the monitoring system were not yet available at the end of the action research and can therefore not be analysed in this report.

6.2.2 Learning about an intervention's effects through Most Significant Change

The 'most significant change' approach was piloted with mixed success by two cases during the action research. Essentially, the 'most significant change' approach involves the collection of significant change stories (positive or negative) from target groups that have been influenced by an intervention. Once stories about significant changes have been captured, project staff or other stakeholders sit down together, read the stories aloud and have in-depth discussions about the value of these reported changes. This process often results in the selection of one 'most significant story' among the various stories captured. Learning occurs through discussion and can provide information for areas for improvement of an intervention (Davies & Dart, 2005).

VLIR-UOS, an umbrella organisation that funds international development cooperation initiatives of Flemish universities, choose to pilot most significant change to learn about the effects of its student scholarship programme. This programme provides funding for students who are attached to development projects for a few months. The programme aims to raise the awareness of students in respect of becoming ambassadors for global solidarity. Returning students are expected to share the insights they gained from their experience in the South with their colleagues, friends and family. The questionnaires that each student has to fill on their return resulted in a large number of reports from which it was difficult to draw useful and practical lessons by the VLIR-UOS coordinators. Because it was practically not feasible to interview students during a first pilot of the most significant change approach, coordinators were asked to write one story that demonstrates a significant change within one of their students, based on the information from the student's questionnaire and, if necessary, additional conversations with the student. Table 6.5 illustrates one such story as well as the reason from the coordinator why she considered this story significant. A story selection process about the collected stories was then organised during a collective reflection meeting with coordinators.

Table 6.5 Illustration of most significant change story from a student participant to the scholarship programme of VLIR-UOS

What did you consider to represent a most significant change with one of your students who participated in the scholarship programme?
Through her first-hand experience with (large) cultural differences in Ghana, the student can now empathise much better with the children in her class who come from a different culture. She gained this skill because she has experienced how challenging it can be to adapt to a new culture. On communicating with people from a different culture the student indicates that she learned that non-verbal communication is very important. As a 'negative' experience, the student mentioned how 'culture clashes' contributed to the difficulty of making clear agreements and things being completely different than planned.
Why is this story significant for you?
The story is important to me because the student, when she will work as a teacher, will be in contact with many young people and therefore there can be a strong multiplication effect. Unfortunately, I was unable to get more feedback from the student because it would be interesting to learn more about specific experiences about adjusting to a new culture the student experienced in Ghana and how she can use this in her work as a teacher in Belgium. Also, concrete examples of the non-verbal communication and the importance of that would have been useful. Also, examples of the problems faced with making agreements and how this has changed the student would be useful to learn from.

An interesting contradiction emerged from the reflection meeting where the stories were discussed. On the one hand, coordinators were questioning what conclusions they could draw concerning the effects or impact of the overall scholarship programme in view of the limited number of stories. There were also doubts about the fact that the significant change was not always clearly described

in the student's feedback in the questionnaire and was therefore rather the interpretation of the coordinator. On the other hand, the coordinators also shared how the discussions triggered by the stories during the story-selection process made them ask the right questions about the programme. One such question that emerged related to the programme's objective about which there didn't seem to be a consensus among the coordinators. While some coordinators assumed that the programme was mainly aiming at development impact in the South, others were of the opinion that awareness-raising in Belgium was its main purpose. There was also no clear conceptualisation or vision about what such impact or awareness-raising would specifically entail. Another lesson that emerged was the realisation that the feedback from the returning students was not effectively utilised to inform the pre- and post-attachment training and reflection sessions with the students. These insights triggered by this first most significant change session helped to convince the coordinators about the feasibility and potential of the method and there was overall consensus to integrate it in the annual monitoring cycles. It was also decided to integrate one section in the returning students questionnaire that asked for one most significant story with a main focus on personal change related to the objectives of development education.

While there are strong indications that the MSC pilot contributed to a critical questioning of the theory of change of the scholarship programme by the programme coordinators, evidence about changes at the level of knowledge, attitudes and behaviour remained limited. This finding is in line with the observations from the VVOB case where MSC was also piloted in a reflection session with teachers involved in the school link programme. Teachers found the approach mainly useful and motivating as a tool to share and learn from the practical experiences of other colleagues in setting up and managing their school links. An important insight for the teachers was for example the fact that colleagues faced similar problems in setting up a school link. This helped them to become more realistic about their objectives and the time it takes to achieve them. For the VVOB management these insights about practical issues related to setting up a school link were unexpected but useful. At the same time, similarly to the VLIR-UOS case, VVOB's first MSC exercise did not provide compelling insights into the effects of the school link programme with regard to changes in teachers' knowledge, attitudes and behaviour. Also, at this stage in the action research it was not clear whether or to what extent the MSC approach would be considered by VVOB management in future PME cycles.

We have to be cautious when drawing conclusions from the results of the two MSC pilots described above. The fact that programme stakeholders in both cases were enthusiastic about the process - as it triggered critical reflection and helped them ask the right questions about what mattered to them most - highlights its potential to provide programmes with a practical and participatory approach to PME that can stimulate learning. At the same time, deeper learning about the stories remains challenging due to the often limited information about the context or process that leads the person to tell his or her specific story. This is again an argument for considering MSC as a rather complementary approach to other PME approaches.

6.2.3 Survey instruments

Two cases (BOS+ and VLIR-UOS) experimented with standardised survey instruments (*i.e.* questionnaires) to help them monitor their programme's contribution to changes in knowledge, attitude and behaviour within their target groups. The overall process of designing the PME process using survey questionnaires consisted of three main phases. The first phase involved the clarification of the hoped for effects in relation to knowledge, attitudes and behaviour. Appendix 2 illustrates the outcomes of this first phase for the BOS+ case. The second phase involved the design of the questionnaire based on the outcomes of the first phase. The BOS+ survey instrument

is shown in Appendix 3. In the VLIR-UOS scholarship programme, the team utilised insights from the clarification of their own theory of change as well as the results from an evaluation of the effects of development education in Belgian schools (Laevers *et al.*, 2010) in order to develop their survey instrument. The questions are mainly measuring perceived changes in relation to attitude and behaviour of the students after their return from their attachment in a development cooperation programme in the South (see Figure 6.4).

Figure 6.4 Extract from VLIR-UOS student evaluation questionnaire

1. How will you share your experiences of your attachment after your return (multiple answers are possible)

	I have already done this	I still plan to do this	I find this relevant but have no time anymore for this	I find this relevant but I don't see myself doing this	I don't find this relevant
Presentation for the next intake of students taking part in the scholarship program	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Guest lecture	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Article in the student magazine or other magazine	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
fundraising for local partner	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Presentation during an info evening	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Designing my own website	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Foto exposition	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Other (please specify)	<input type="text"/>				

The third phase consisted of the implementation of the survey instrument. In the BOS+ case the survey was used in a pre- and post-intervention measurement which allowed a comparison between the responses before and after the intervention. In the case of VLIR-UOS there was no pre-intervention measurement but instead participants were asked about how they perceived changes after having participated at a specific development education intervention.

a) Advantages of questionnaires

There are three distinct advantages that emerged from the various pilots with survey instruments. A main advantage was the fact that the development of the questionnaires helped to pull the respective programme teams out of their action mode and somehow forced them to reflect on their programme's objectives and the effects that they were hoping to contribute to. As was already mentioned above, in order to develop the questionnaire questions, each case had to go first through a process of clarifying for themselves which effects they hoped to contribute to within their target groups in relation to knowledge, attitudes and behaviour (see Appendix 2 for the outcomes of this process for the BOS+ case). The importance of clarifying the programme's objectives is illustrated by the following quote from one of the BOS+ programme coordinators:

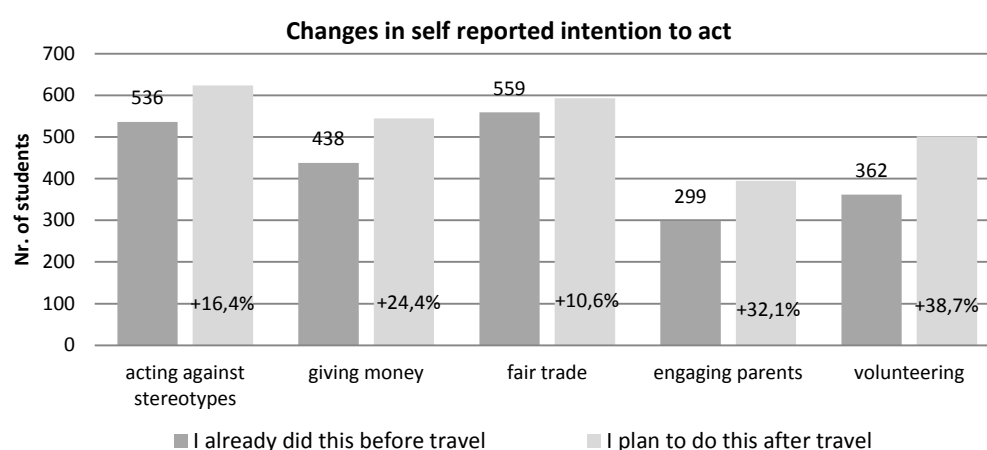
The following question that we were asked at the start of our PME process was an important learning for me: What changes do you seek to obtain through your programme? This is a very obvious question but it surprised me how difficult it was to give a precise answer to it. While we assumed to have a well outlined programme objective, I

learned that it is quite challenging to make it more explicit or to operationalise our objective' BOS+ programme coordinator.

The learning experience illustrated in the above quote was further strengthened by the fact that the BOS+ programme coordinator involved colleagues from the education team and one external organisation in the development of the survey instrument and the design of the PME process. Similarly, in the VLIR-UOS case, the programme coordinator, the HIVA researcher and the field coordinators from the various universities and high schools participated in the revision of the student questionnaire. This collaboration helped to make sure that the questions addressed the various information needs of the main actors involved in the programme. These examples illustrate how a collective reflection about a programme's PME process can result in a deeper understanding of a programme's objectives.

A second advantage that emerged from the various cases that used survey instruments was the fact that the closed questions provided quantitative monitoring data that could easily be visualised and reported through tables and graphs. It also facilitated some descriptive statistics that helped to show trends of change over time or comparisons between different groups of respondents. Figure 6.5 for example shows an increase in the student's intention to take positive action towards some aspects of global citizenship due to their participation in the VLIR-UOS scholarship programme. Interestingly the figure also shows that a majority of the students is already engaged before their involvement in the programme which learns that the programme is mainly reaching a target group that is already convinced about the importance of global solidarity and global citizenship. In the BOS+ case simple excel tools such as the T-test¹ were used to calculate the level of significance for observed differences in responses between pre- and post-intervention measurements (see Appendix 4).

Figure 6.5 Changes in self-reported intention to act (extract from monitoring report VLIR-UOS case, 2012)



The open survey questions on the other hand provided additional qualitative information that were useful for explaining some of the answers to the closed questions or to provide information about unexpected effects. For example, in the VLIR-UOS case, a small minority of four students

¹ The T-test is a statistical test that allows you to determine the probability that the difference between two data sets is caused by chance or if the difference is significant - <http://www.quantitativeskills.com/sisa/statistics/t-thlp.htm>

indicated that their attachment had rather confirmed certain stereotypes about developing countries which they did not have before. One of the students formulates it as follows:

'Before my attachment I always tried to counter stereotypes about the South but now I feel that some of them are actually true, for example the stereotype that people in the South do not work hard. I am sad I have to admit but I have met many people that do not work hard, while there are of course also many who do work hard but they were a minority. So my opinion has changed in that respect.'

A third advantage of standardised questionnaires that emerged from the action research was their practicality. They were considered by the cases that piloted them as a rather quick means of assessing knowledge, attitudes or behaviour change over larger numbers of people hence also allowing more representative samples of respondents (e.g. in the BOS+ case allowing some simple statistics). Furthermore, due to the specific short time span of the interventions, some cases preferred the survey instruments and saw it as unpractical to involve the target groups in process-like monitoring activities that take place over a longer period of time. Also questionnaires with closed questions were considered more appropriate for target groups who find it difficult to express themselves through stories or open questions (e.g. wood work students in the BOS+ case).

b) Challenges faced with the use of survey instruments

There are also three specific disadvantages or challenges that emerged from the use of standardised questionnaires during the action research.

A first challenge pertains the limited depth of insights that could be obtained from the quantitative data that emerged from the questionnaires. There was also limited evidence from the cases that the monitoring information obtained through the questionnaires contributed to deep reflections about the programme or adjustments of the programme strategies. In the BOS+ case for example, while it was interesting to note that averagely, respondents would indicate an increased knowledge, attitude and intention for action in the post intervention measurement (see Appendix 4), questions remained about the conclusions that could be drawn from this and how this information could be useful to draw lessons about the effectiveness of the programme. The information also didn't provide insights in the durability of the observed changes. In addition it was indicated by programme staff that some changes might not yet be observable at the time of responding to the questionnaire. This is illustrated by the following quote from the BOS+ case:

'There might be small changes among the participants of the education programme that may not be immediately visible but which, under the influence of other experiences in the future, can contribute to an increased consciousness about the importance of sustainability at an ecological and global development level.'

A second challenge relates to the attribution problem. In the BOS+ case, pertinent questions remained about the extent to which the observed difference in responses in the pre- and post-test could be attributed to the programme since many other factors could have played a role. In all cases the capacity was also limited to work with control groups of students who were not involved in the programme. Limited access to potential respondents outside the intervention group and lack of interest among non-target groups to fill in questionnaires were two factors that made experimental designs very difficult and even counterproductive in the different cases.

A third challenge pertained the limited number of questions that can be included in the questionnaires without making them too long so that respondents would not be demotivated to respond. In that regard it was questioned if a questionnaire can sufficiently cover the complex learning objectives of the education programme. Also the use of closed questions, while easier to

administer, proved to exclude information about unexpected changes that are not captured by the predetermined questions.

7 | Learning from the monitoring data

Earlier in this chapter, we explained the importance of a learning-oriented monitoring and evaluation approach when dealing with change processes that are complex. Due to their unpredictable and non-linear nature, it is crucial to learn on a regular basis about any observable effects or results as they emerge, in order to learn what is working and what is not and adjust programme strategies accordingly in order to improve the programme. Many organisations expect their PME system to contribute to such learning. In practice however, it is not uncommon that satisfying the accountability needs (*e.g.* satisfying reporting requirements for the donor) takes the upper hand. Learning often comes as an afterthought or is assumed to happen automatically, as long as the right information is collected. However, evidence from the action research as well as current monitoring and evaluation literature shows that the collection of the right monitoring information will not by definition result in learning by various stakeholders involved in the programme (Huyse, 2011; Guijt, 2008). Table 7.1 summarises the learning challenges that were observed in some of the action research cases.

Table 7.1 Illustrations of learning challenges observed in the action research cases

Case	Learning challenge that organisations were hoping to address through the action research
VLIR-UOS and TRIAS	Analysis of the monitoring data was initially done centrally by the coordinators at the head offices. This contributed to an overload of monitoring information which proved to be a challenge for analysis and for drawing meaningful lessons. Mainly the head office coordinators would learn in the process. The role of the staff in the PME system was mainly limited to the collection of the data.
Vredes-eilanden and WSM, BOS+	Limited learning across different PME systems set up around individual activities or campaigns within the same organisation. This resulted in limited insight into the organisation's progress or contribution to the overall aim of their development education programmes.
Open Dock, Esperanzah	No formal PME systems but learning was mainly taking place informally through conversations and reflections among staff. Lessons learned were however not always documented. As a result, systematic records of lessons learned about the programme's effects and how these were used for programme adjustment remained limited.
VVOB	Limited learning about the impact of the school link on the school and change in relation to knowledge, attitudes and behaviour in relation to North/South issues.

The learning challenges in Table 7.1 illustrate that analysis and making sense of the monitoring data run the risk of becoming an individual's chore, mainly aimed at feeding reports without contributing to wider learning among various actors within a programme or organisation. At the same time, in those cases where learning was reported to be mainly occurring at an informal level, producing documented evidence that learning had taken place about a programme's effects remained a major challenge. Also the tendency in some cases to develop 'isolated' monitoring and evaluation processes around specific activities within a larger development education programme

was shown to result in fragmented PME systems that provided limited insights in the effects of an overall development education programme.

Investing in joint reflection, at various levels within a programme, both formally and informally is key (Smit, 2007). A mistake that is often made is to keep concepts about learning too vague and not translate them into concrete actions (*ibid.*). In such cases it is difficult to change deeply-engrained behavioural patterns in organisations, such as a lack of time for reflection. Creating the space to get together with the relevant actors and to make collective sense of the monitoring data in relation to the objectives and vision of the overall programme has proved essential to enhance collaborative learning in a majority of the action research cases. In the Trias and the VLIR-UOS cases for example, it was decided that North-South advisors (Trias) and the field coordinators (VLIR-UOS) should carry out a first analysis of the PME information from their specific target groups. The expected changes as determined in the respective theories of change are being used as an analytic framework for this analysis. Thereafter, reflection meetings with project staff are being organised during each monitoring cycle to collectively discuss the results from the first analysis phase and to draw lessons for future planning within the programme. Textbox 10 illustrates this for the Trias case.

Textbox 10: developing rhythms and spaces for joint reflection (Trias case)

Trias has a rich toolbox with instruments to collect monitoring and evaluation data. These instruments include an Excel database in which quantitative information is stored by North-South advisors and partner working groups about the number of participants at project activities, the number of requests for support from the partner organisations, number of people that are actively involved in the member organisations, and participants at North-South exchange visits. In addition, effect assessment diaries filled in by the North South advisors and the scoring tool for monitoring changes in knowledge, attitude, and behaviour of partner organisations form part of the data collection toolbox. Analysis of the large amount of data provided by these tools and collective learning about these data was a major challenge. This challenge was addressed in the following way:

- making the North-South advisors responsible for analysing the PME data from their specific target groups;
- organising a two-day reflection meeting every year to draw lessons from the PME information that is analysed by the North-South advisors;
- feedback of the main lessons learned from the PME cycle to the partners during partner meetings linked to each monitoring cycle.

The fact that joint reflections can contribute to useful insights and critical questions about the programme is evidenced by the following action points that emerged from a reflection meeting with Trias staff at the end of the 2012 monitoring cycle:

- need to better specify the target groups such as staff or management within the partner organisations at national, provincial or regional level;
- need to clarify objectives. For example, do we see an expert visit to the South as a strategy for awareness raising or do we need to raise the awareness of the experts before their departure?
- the increased willingness and motivation of volunteers from the partner organisations to become actively engaged in the N-S partnerships as observed from the monitoring data, led to the realisation that a more structural engagement strategy for the volunteers needed to be developed.

Active participation of programme actors emerged as another important condition to ensure meaningful learning from monitoring and evaluation data that goes beyond mere information exchange. Being actively involved in learning processes that are relevant for the work or life of the participant and in which he or she has an active role in the sense-making process and a voice in future decision-making appeared to be important characteristics of such active participation. Furthermore, it was shown to take time, trust and skilful facilitation for achieving such active participation. Textbox 11 illustrates how opportunities for active participation in the PME process in some of the action research cases resulted in collective learning and decision making about adaptations in programme design or programme management.

Textbox 11: promoting learning through active participation

In the Trias case, a reflection exercise on the monitoring and evaluation system of the North programme was carried out with active input from the Trias programme coordinators and representatives from the partner organisations. This reflection exercise provided the space for discussion about what was going well and what was seen to be a challenge. This resulted in concrete steps to improve the PME system such as the improved alignment of the various data collection tools with collective reflection moments, the reduction of the number of focus group discussions to avoid work overload for the partner organisations and the involvement of field coordinators in the data analysis process.

In the World Solidarity case, the action research process provided a conducive space for experimentation with various PME approaches and tools. As the action research progressed, more staff members became actively involved, resulting in a collective critical reflection on World Solidarity's overall PME system and the collaborative development of a new integrated PME system and policy for the whole organisation. This proved to be a technical as well as a political process where active participation helped to question existing well-established ways of working and existing power positions.

In the Vredeseilanden case, an external evaluation provided a space for the complete staff of the North service to reflect critically on the various components of their development education and awareness raising programme. Rather than a mere external assessment about the programme's achievements, the evaluation facilitated a collaborative questioning of the programme's overall theory of change and the relevance and effectiveness of the chosen strategies. New insights about opportunities for the up-scaling of certain programme components contributed to significant adaptations in the North programme of Vredeseilanden.

The cases in Textbox 11 illustrate that active participation can contribute to building trust and transparency among the participating stakeholders and can ultimately lead to strong relationships between programme stakeholders. Elements of such relationships include shared vision, clear intents and purpose, clear roles and responsibilities, flexibility and openness to change (Horton *et al.*, 2003). A practical way to foster such active participation is through promoting spaces for critical reflection, open communication and feedback. Communicating PME findings and decisions taken - based on the collected data - recognises and acknowledges the contributions from different actors by showing that the data are actually used (and for what). It is an important feedback mechanism that can improve transparency, downward accountability and trust. Stimulating quality feedback is almost synonymous with stimulating learning (Leeuwis, 2004).

8 | Conclusion

The action research presented in this report has sought to further the debate about the implications of the complexity of development education programmes for their PME. Such debate is needed in view of a growing call for results-based management of such externally funded programmes. Based on the literature from the fields of international development cooperation and development education, and supported by our study results, we have argued that there is need for alternative results-based management approaches that promote learning and help actors involved in development education deal with unpredictability and non-linearity. It is within this context that 10 Belgian organisations participated in an action research process (2010-2013) to explore how different complexity oriented PME approaches could help them to learn about the effects of their development education interventions. The piloted approaches discussed in this report include outcome mapping, most significant change, scoring tools and survey methods.

From the action research we learn that organisations face considerable challenges in demonstrating their results and in drawing meaningful lessons from the monitoring data they collect. At a conceptual level, a majority of the organisations who participated in the action research struggled to clarify the objectives of their interventions. Vague definitions of development education in the literature contributed to this challenge. Furthermore, theories of change were often characterized by large assumptions, limited specification of the target groups as well as the changes that a programme would hope to see in relation to knowledge, attitudes and behavior. This was shown to result in fragmented PME systems focusing on individual programme activities instead of overall programme results. Practical challenges included limited knowledge of existing PME tools, limited means for PME (including time and financial resources), a larger focus on data collection instead of data analysis and more attention towards programme activities as compared to a programme's effects.

At the same time, based on the progress that a majority of the cases made in relation to their PME practice during the action research, we can also argue that PME of the effects of development education interventions doesn't necessarily require sophisticated academic research capacity. Instead we identified the following elements of a PME system that are both essential to help organisations learn about their results but at the same time are practically feasible as demonstrated in the action research:

1. *Towards a more sophisticated actor focused theory of change:* clarifying a programme's actor centred theory of change, was shown to be an essential step for developing a learning centred PME system. The spheres of influence tool from the outcome mapping methodology was shown to have great potential for helping organisations in that respect as it offers a practical framework that helps to identify the actors whom a programme seeks to influence directly and indirectly and the changes that a programme hopes to see within those actors. From the theories of change that were developed in the cases participating in the action research, two different groups of effects emerged that required different PME approaches.
 - A first group comprises of effects related to capacity development of organisations so that they are better able to carry out their own development education interventions. It emerged

from the action research that capacity development had not been recognised as a result area within the PME systems of a majority of the cases and therefore important changes in relation to capacity development would be missed during PME. As a result programme activities would not be reflected upon in terms of their effectiveness vis-à-vis supporting capacity development of specific target groups. The importance of considering capacity development as a result area in PME was evidenced by the VVOB and World Solidarity cases where it was identified as a key objective to strengthen the sustainability of the programme's results, i.e. schools (VVOB) or members of the Christian labour movement (World Solidarity) who have the necessary capacity to continue implementing development education initiatives even after the lifetime of the programme.

- A second group comprises of effects that relate to changes in knowledge, attitudes and behaviour of people influenced directly or indirectly by the development education intervention. In a majority of the cases there was only limited clarity about what those changes could actually entail and it was a major challenge to specify which specific changes they were hoping to contribute to with their programmes. This also contributed to considerable challenges when designing data collection tools (e.g. what questions to ask if you are not sure what you are aiming at?) or data analysis tools (e.g. how to analyse monitoring data if you don't have specific analytic categories to help you to categorise and make sense of the data?). Unpacking the hoped for effects in relation to knowledge, attitudes and behaviour emerged as an important step in developing a programme's theory of change as it helped to get more clarity about the hoped for effects or impact. The descriptions of the hoped for changes then provided the building blocks for designing monitoring tools such as scoring tools (e.g. TRIAS and Globelink) or the questions of survey instruments (e.g. BOS+ and VLIR-UOS).

It is an important conclusion of this research that clarifying an actor centred theory of change which provides a more sophisticated insight in a programme's hoped for effects is an important step towards developing 'clarity about its own approach and theoretical basis' (Bourn, 2011: p. 26). Such clarity can help programme teams to determine what PME information is needed (e.g. which changes they need to follow up) and what is practically feasible (e.g. which PME methods are most suitable for their context).

2. *Towards a diversified PME toolbox*

- *PME of capacity development*: In the context of the cases discussed in this report, **Outcome Mapping** was seen to be helpful for monitoring change related to capacity development. Particularly its focus on changes in behaviour or practice of the direct target groups of a programme (*i.e.* boundary partners) and its practical tools to monitor these changes (*i.e.* progress markers) made outcome mapping an attractive approach for PME of capacity development. This was particularly so for the VVOB and World Solidarity cases where capacity development of the direct target groups was an explicit objective.
- *PME of changes in knowledge, attitudes and behaviour*: The methods piloted in this action research for monitoring changes in knowledge, attitudes and behaviour can be categorised in two groups. A first group of methods include scoring tools and survey instruments. They require the development of an analytic framework that describes the changes that a programme is hoping to contribute to within their target groups in relation to knowledge, attitudes and behaviour. The second group includes the Most Significant Change method which doesn't necessarily require the development of such an analytic framework in advance.
 - **Scoring tools**, in combination with various data collection tools such as focus group discussions, personal journals, field visits and factual data collection and when used as a guide for discussions and critical reflections, were shown to be helpful for monitoring

this second group of effects as evidenced by the TRIAS case. While the scoring tool helped to provide tangible evidence about changes in knowledge, attitudes and behaviour (both positive and negative), questions remained about the fact that qualitative descriptions of the score items can be interpreted in different ways making it difficult to determine particular scores. At the same, when the scoring tool was used as a basis for discussion, as in the TRIAS case, different interpretations from target groups and team members were shown to benefit the learning process about the programme's effects.

- From the cases that used **survey instruments** it was learned that the development of the questionnaires can trigger useful reflections among programme staff about a programme's objectives and the changes that it hopes to contribute to. In addition, they were also shown to provide monitoring data that can visualise trends within observed or self-reported changes in relation to knowledge, attitudes and behaviour. At the same time, partly due to the limited experience and capacity of quantitative survey research, questions remained about the usefulness of survey instruments for gaining deeper insights in the learning process of the target groups, the durability of the reported changes as well as their attribution to the programme. Also the risk to miss unexpected and unintended changes when using closed questions emerged as a limitation. These challenges point towards the importance of using survey methods in combination with other PME approaches.
 - **Most significant change** emerged as a monitoring approach that was strongly enjoyed by programme stakeholders as it gave them an opportunity to tell their story or helped them to ask the right questions about the programme and therefore contributed to deeper reflection and had the potential to stimulate learning about a programme's effects. However, due to the limited scale of the MSC pilots, evidence of learning about a programme's effects through MSC remained limited. Also deeper learning about the stories remains challenging due to the often limited information about the context or process that leads the person to tell his or her specific story. This is again an argument for considering MSC as a rather complementary approach to other PME approaches.
3. *Going beyond data collection:* the action research also learns that data collection about a programme's effects will not suffice. Once the data have been collected there is need to analyse the data, to make sense of it collectively and to use the lessons to improve the programme and to provide feedback to various stakeholders within the programme. Making the necessary space for collective reflection can strengthen this sense making process. Also providing the opportunity for active participation in the PME process can help to make sure that the lessons learned are indeed used to improve practice.
 4. *The need for a genuine interest to learn:* good PME practice is not only about choosing and implementing the right approach or tools. A minimum requirement is to have people who are genuinely interested to learn together with colleagues or programme stakeholders about the effects of their programme. This interest can help to provide the energy and the leadership to explore and adapt PME tools, to create the necessary space for PME and to motivate colleagues and even target groups to become actively involved in PME activities.
 5. *Have the courage to experiment:* a good practice towards strengthening PME is to see PME challenges as possible sources for learning and improvement. This is evidenced in the various cases where specific PME challenges were identified and reformulated into research questions which were then explored in the action research process. This not only resulted in the piloting of new PME approaches but also in a more systematic reflection upon the implementation of

these new approaches, drawing lessons and using these lessons to adjust and improve practice. We believe that there is great need to stimulate and support such forms of experimentation with alternative approaches and methods from different sectors outside the field of development education. Many promising approaches for PME have been developed and implemented in various research disciplines which development educators can explore. Examples include evaluation techniques used in experience-based learning (Laevers *et al.*, 2010) or the use of Sensemaker in the private and international development sectors which allows trends in how learners signify their own micro-narratives about the effects of specific programmes to be visualized (Deprez *et al.*, 2012).

6. *Recommendations for donor organisations:* towards donor organisations who provide subsidies for development education programmes and who also have to respond to the results agenda we can filter the following recommendations from the results of the action research. Firstly, consider using a wider notion of what results can entail. Results related to capacity development of intermediate actors who in turn can implement development education processes, was shown to constitute an important result area across the action research cases and which is key to ensure sustained implementation of development education processes even after the life time of a funded programme. Secondly, donors may consider to make the clarification of an actor centred theory of change with a clearer understanding of a programme's objectives in relation to the hoped for changes at the level of the programme's target groups as an important aspect of its subsidy application procedure. Thirdly, refrain from imposing specific PSE methods but instead ask to report more thoroughly on lessons learned about a programme's results or effects and how these lessons were used to inform programme planning or implementation.

While the ingredients of a learning centred PME practice described above emerged from the action research cases, many challenges still remain. The various cases clearly show that time, resources and PME capacity continues to be a limiting factor for sustaining PME practice and for involving various stakeholders in the PME process. Also many questions remain about data collection, data analysis and sense making and the validity and trustworthiness of the monitoring information. This report doesn't aim at answering or exploring all these questions but instead hopes to offer a step in helping development education practitioners and researchers to explore the potential of alternative PME approaches that can help organisations to respond to a growing results agenda by reorienting their PME practice towards results based learning instead of holding on to a more traditional technocratic and functional form of results based management.

appendix 1 Analytic framework for the four dimensions of the education continuum (World Solidarity Programme)

The table shows the specific changes that the World Solidarity programme is hoping to contribute to within their target groups (key figures within the organisations of the Christian Labour Movement) for the four dimensions of the education continuum: knowledge, attitude, competencies and behaviour.

Knowledge	Attitude	Competencies	Behaviour
<p>1. Specifieke aanpak van WSM:</p> <ul style="list-style-type: none"> - werken met sociale bewegingen in Noord en Zuid; - co-verantwoordelijkheid; - specifieke thema's; waardig werk/sociale bescherming; - samenwerking tussen Noord en Zuid; - mensen in het Zuiden zijn actor in hun eigen verandering. <p>2. Visie van WSM op ontwikkelingssamenwerking</p> <p>3. Realiteit van de partners in het Zuiden</p> <p>4. Enjeux globaux thematique spécifiques/internationale mecanismes/complexiteit m.b.t. WW en SB</p> <p>5. Besef dat er onderlinge interdependentie, verbondenheid en betrokkenheid is tussen Noord en Zuid (mondiaal burgerschap)</p> <p>6. Mensen beschikken over kennis om stereotypen te kunnen weerleggen</p> <p>7. Kennis over het handelingsperspectief: wat kunnen mensen doen</p>	<p>1. Gevoel van verbondenheid als krachtige basis om de overgang te kunnen maken van het vreemd vinden van het Zuiden tot het:</p> <ul style="list-style-type: none"> - herkenbaar maken; - zelf willen ontmoeten; - nodige gevoel/emotie hebben om verbondenheid concreet te maken. <p>2. In hun leven rechtvaardige NZ verhoudingen belangrijker gaan vinden om ermee bezig te zijn</p> <p>3. Specifieke attitudes:</p> <ul style="list-style-type: none"> - gunstiger staan t.o.v. steun aan soc. bewegingen in Noord en Zuid; - sociale bewegingen als vanzelfsprekende tool om rechtvaardigheid te bereiken; - meer specifiek → gunstig staan tegenover WS als tool om dit te bereiken. <p>4. In hoeverre is men bereid iets te gaan doen?</p> <ul style="list-style-type: none"> - als individu (achterban of bevolking in algemeen); - als organisatie (en iedereen erin). <p>5. Respect voor anderen, bestaande verschillen en eigenheid</p>	<p>1. Interculturele vaardigheden:</p> <ul style="list-style-type: none"> - doorheen verschillen ook gelijkenissen zien; - codewisseling & 'kiezen voor dialoog en samenwerking'. <p>2. Empathie (EQ)(gezien als heel belangrijk): vermogen hebben om je in te leven in situaties in het Zuiden, je te verplaatsen in gedachten, gevoelens, ...</p> <p>3. Ratio (IQ): complexe NZ relaties, interdependentie kunnen analyseren, ...</p> <p>4. Leren aan en van elkaar: andere zienswijzen leren kennen, eigen referentiekaders bevragen en of bijstellen</p>	<p><i>Concreet gedrag op niveau van individuen:</i></p> <ol style="list-style-type: none"> 1. Financiële steun 2. Deelnemen aan activiteiten van WS (bv. stuurgroep, ervaringsreis, ...) 3. Zelf opzetten van activiteiten/Zelf doen binnen het kader van WS en buiten het kader van WS, bv. actie voeren, getuigenis, zelf communiceren, ... <p><i>Aankoopgedrag/ consumptiegedrag aanpassen Concrete gedragingen die we willen op niveau van organisaties:</i></p> <p>A. Deelorganisatie en verbonden:</p> <ul style="list-style-type: none"> - opnemen van WSM in programma van de DO's; - financiële steun; - opnemen van een mandaat binnen bestuursorganen van WS; - engagement opnemen als campagnepartner (eigen acties WSM als kernresultaat/opdracht nemen. <p>B. De kaders, beroepskrachten, ... binnen de organisaties en regio's-intermediairen:</p> <ul style="list-style-type: none"> - ambassadeur van WS worden binnen hun organisatie, bv. zelf kennis en info vergaren, zelf acties ondernemen, integreren in planning; - elke intermediair is ook individu (zie hoger punt).

appendix 2 Intended changes at the level of the direct target groups of BOS+

BOS+ seeks to influence the following changes within its direct target group (*i.e.* pupils within vocational secondary education) in relation to knowledge, attitude, competencies and behaviour.

a) Kennis en inzicht

- De jongeren zijn zich bewust van het belang van duurzaam bos- en houtgebruik in Noord en Zuid om verdere globale klimaatverandering tegen te gaan.
- Jongeren hebben een algemeen beeld van de productieketen: de productie van hout, houtkap, vervoer en verwerking ervan + het Noord-Zuidverband.
- Jongeren beseffen en zien zichzelf als een deel van deze keten.
- Jongeren weten dat elk onderdeel van deze keten zijn impact heeft op het milieu. Jongeren weten in concreto:
 - dat ongebreidelde houtkap schade toebrengt aan het milieu en klimaatverandering verergert;
 - dat het langeafstandsvervoer van hout belastend is voor het milieu (hoe verder, hoe meer olie, hoe meer uitlaatgassen);
 - dat bij de verwerking van hout hier vooral afvalhout en toxische producten belastend zijn voor het milieu.
- Jongeren weten dat houtkap sociale gevolgen heeft. Jongeren weten in concreto:
 - dat bosarbeiders in het zuiden veelal geen eerlijk loon krijgen en/of in gevaarlijke omstandigheden moeten werken;
 - dat gemeenschappen die leven van het bos onder druk komen te staan.
- Jongeren weten dat er alternatieve wegen zijn tot een duurzaam houtgebruik. Jongeren weten in concreto:
 - dat gelabeld hout een zekere garantie geeft wat betreft duurzame houtkap, heraanplanting en een eerlijk loon voor de bosarbeiders;
 - dat er voor vele houtsoorten uit de tropen even kwalitatieve soorten uit Europa zijn. Deze zijn te verkiezen wegens minder vervoer;
 - dat er in de productie via planning, creativiteit en recyclage afvalhout grotendeels vermeden kan worden;
 - dat er voor een groot deel van de toxische producten (verf, lijm, vernis), milieuvriendelijke alternatieven zijn.

b) Waarden en houding

- De jongeren ontwikkelen een houding van betrokkenheid tegenover de wereld, inclusief het Zuiden, eerder dan een individuele of cynische houding.
- De jongeren hebben het gevoel dat zij als houtbewerker een zekere verantwoordelijkheid dragen, van waaruit ze een positieve keuze voor duurzaamheid maken.
- De jongeren voelen zich deel van die complexe, mondiale houtsector-keten.
- De jongeren voelen zichzelf actor in deze keten:
 - ze geloven dat hun keuzes en gedrag een verschil kan maken in deze wereld;

- ze voelen zich gesterkt in hun mogelijkheden door de duurzame alternatieven die doorheen het project aan bod zijn gekomen.

c) Vaardigheden

Jongeren kunnen deze inzichten (houtbewerking in een context van klimaat, milieu en noord-zuid) en de waarden articuleren in een gesprek.

d) Gedragsverandering

Deze jongeren engageren zich om hun (toekomstig) houtgebruik op een klimaatvriendelijke manier te verduurzamen.

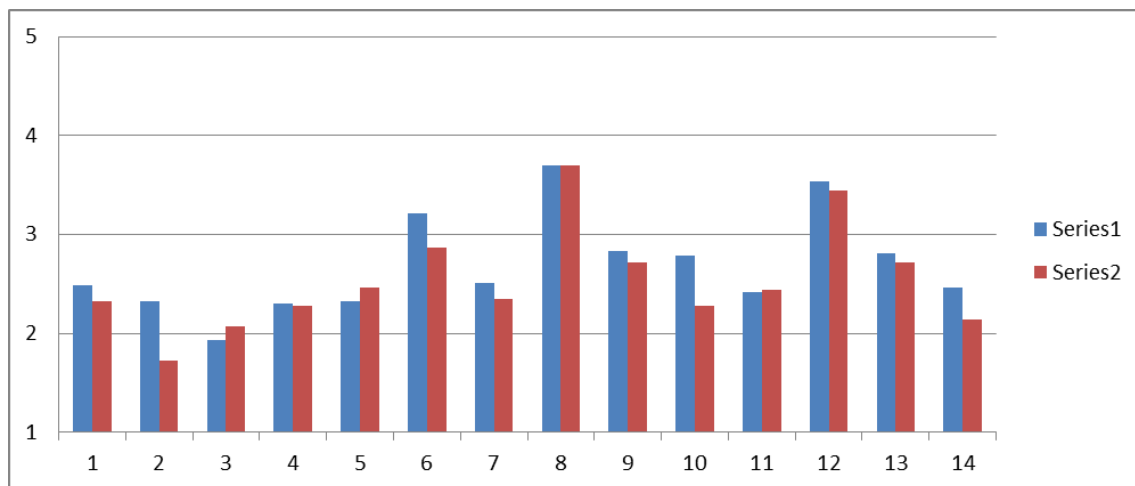
appendix 3 Vragenlijst voor effectmonitoring BOS+

		Volledig akkoord	Eerder akkoord	Min of meer akkoord	Eerder niet akkoord	Helema al niet akkoord
1.	Ik vind het belangrijk te weten uit welk land het hout dat ik gebruik vandaan komt.					
2.	Ik weet wat het FSC-label inhoudt.					
3.	Ik vind dat je in je vak als houtbewerker rekening moet houden met het milieu.					
4.	Ik voel me in staat om aan anderen uit te leggen wat men verstaat onder duurzaamheid.					
5.	Ik voel me in staat om me in te leven in de situatie van mensen in het Zuiden van de wereld.					
6.	Ik ben bezorgd over de ontbossing in de wereld.					
7.	Klimaatverandering is ook mijn probleem.					
8.	Als houtbewerkers in het Zuiden van de wereld arm zijn, dan is dat normaalgezien hun eigen fout.					
9.	Ik verkies Europese houtsoorten boven tropisch hout, zolang beide even geschikt zijn voor het werkstuk dat ik maak.					
10.	Ik heb kennis van milieuvriendelijk houtgebruik.					
11.	Ik vind het belangrijk dat het hout dat ik gebruik gelabeld is.					
12.	Duurzaam houtgebruik is een saai onderwerp.					
13.	Als ikzelf op een duurzame manier met hout omga, heeft dat een invloed op het milieu.					
14.	Ik begrijp het verband tussen houtkap en klimaatverandering.					

appendix 4 T-test of calculated averages of responses during first measurement and second measurement to the survey questions shown in Appendix 3

(Numbers in the horizontal axis correspond to question numbers as shown in Appendix 3)

VRAAG	1	2	3	4	5	6	7	8	9	10	11	12	13	14
GEM Baseline	2,488372	2,325581	1,930233	2,302326	2,325581	3,209302	2,511628	3,697674	2,837209	2,790698	2,418605	3,534884	2,813953	2,465116
SD Baseline	0,960459	1,128018	0,703574	1,0359	0,89232	0,832613	1,0773	0,802819	1,089566	0,741881	0,82325	0,882336	0,957572	1,031615
GEM 2e Meting	2,325581	1,72093	2,069767	2,27907	2,465116	2,860465	2,348837	3,697674	2,72093	2,27907	2,44186	3,44186	2,72093	2,139535
SD 2e Meting	0,837255	0,66639	0,703574	0,881708	1,054443	1,125069	1,043887	0,802819	0,983811	0,825936	0,983248	0,853629	0,854277	0,774025
T-Test	0,323037	0,000291	0,278432	0,878041	0,309038	0,045589	0,425368	1	0,606019	0,001839	0,888372	0,485975	0,611369	0,060491



Statistical significance according to the results of the T-test were found for questions 2, 6 & 10 (almost for question 14).

appendix 5 Analytic framework to monitor the effects of Globelink's KRAS programme

Skill	Definition	Levels		
		Basic	Developing	Advanced
New knowledge	Do students acquire new knowledge on the thematic?	Participants have read the documentation map en they use it during the debate	Students use information provided by Globelink together with other sources of information. Information is strongly linked to the role that the student has to play. Suggested solutions are situated within previously established patterns of thinking	Multiple sources are used to gather information. These are used to suggest new solutions and ideas
Systemic thinking	Are students able to make links between different factors to better address complex contemporary global issues?	Reasoning is based on highly linear cause-effect relationships seen from only one specific perspective	Various aspects of a problem are discussed and linked to each other. The place of their role in this system is often still unknown & underexposed	Clear long-term vision taking many different aspects of the problem into account. The place of their role within this broader context is more apparent
Value development	Are participants able to determine their own position on the issue while taking in consideration other views & frameworks?	Students are aware of the existence of different value frameworks, without necessarily understanding them. The other value framework is perceived as threatening. There is little openness to the other value frames	Students have better understanding of other value-frameworks. This understanding is applied during the debates	Students are able to place their value system in perspective with other value frameworks and ways of thinking. This is done in a way so that it can contribute to a workable solution

Skill	Definition	Levels		
		Basic	Developing	Advanced
Emotion-related skills	Show participants emotion? Do they make a link with their own lives?	Emotion showing which demonstrates that participants feel involved with the theme	Participants use their own emotion in an appropriate way (constructive and/or strategic) during the debates	Participants know and understand their own emotions but also those of others. They understand that some things are emotionally difficult for others. They use others' emotions in an appropriate way (constructive and/or strategic) during the game
Action-oriented	Are participants willing to take action?	All expressions of commitment to the session belong to a basic level	Involvement of participants transcends their own role	The involvement translates to more concrete action. They do something that is in line with the theme, their opinion and the position made during the game. They realize that the impact of the decision also an impact on their life and find ways to deal with that

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